marketware

Better understanding brings better results

MarketWare v.10

Training Guide

Purpose

The purpose of this training guide is to familiarize you with the “day-to-day” usage of the most common features in MarketWare, and is not intended as an in-depth user manual. If you need additional assistance, please refer to the MarketWare User Manual, Contents, or the Teach Me Videos found on the Help Menu within MarketWare.

Below is an outline of the features we will be discussing in this training guide:

1. Understanding MarketWare Screen Layout

2. Understanding how the database is organized.
    a. Group Information
    b. Physician Information
    c. Setting up and working an Action Plan
    d. Identifying Issues and Problems

3. Finding information in the database, Physicians, Groups, etc.
    a. Using Search

4. Working with Lists
    a. My Doctors List
    b. Physicians by Specialty

5. Creating Marketing Plans

6. Setting Goals with Physicians
    a. Using the Calendar
    b. Recording Results
    c. Using the History Wizard
    d. Displaying History & Notes

7. Resolving Issues and Problems
    a. Notifying Responsible Persons
    b. Managing Outstanding Issues
    c. Closing Out Issues

8. Printing Reports

9. User Preferences Setup

10. Are We There Yet?

11. How to Contact Us

Getting Started

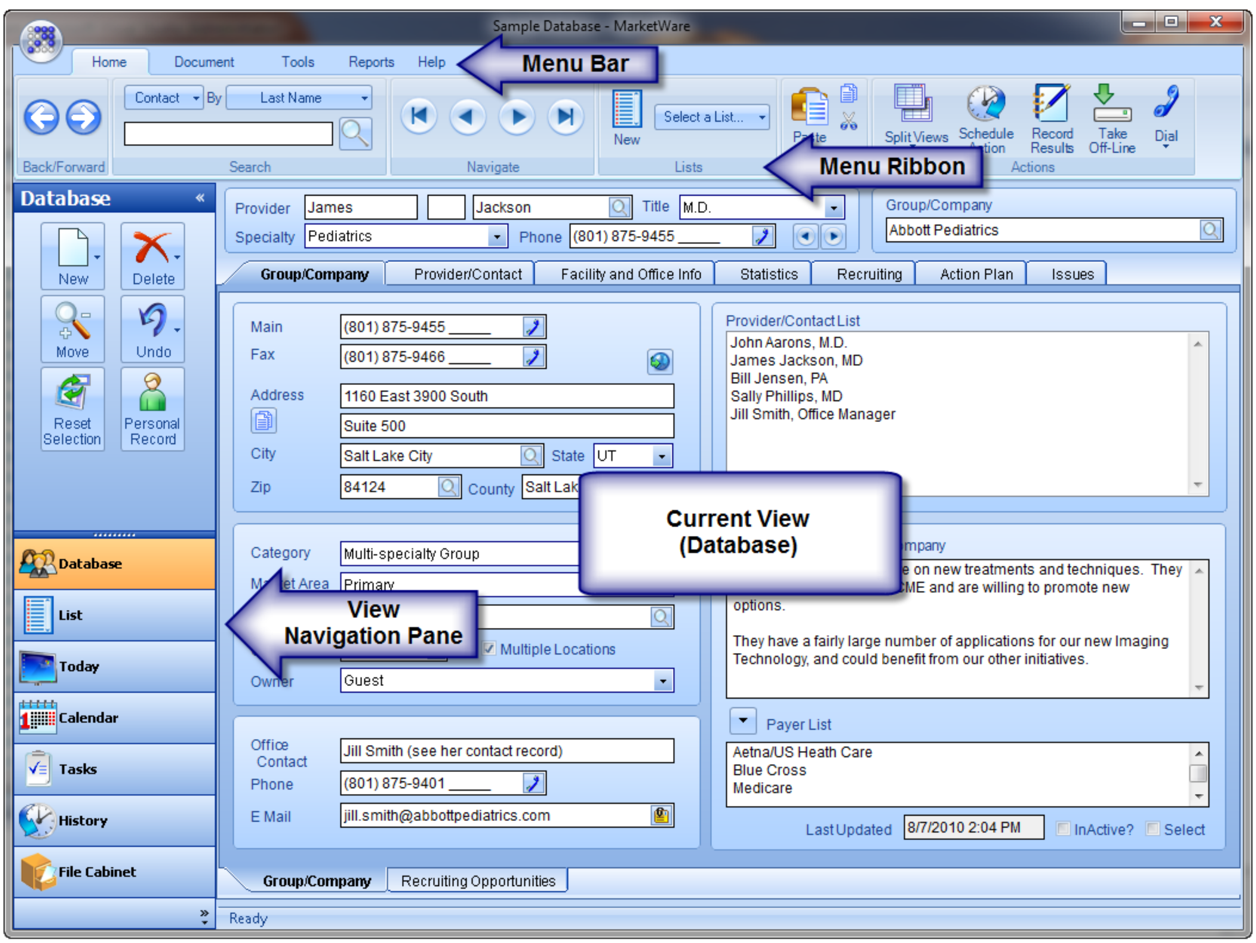
Understanding MarketWare Screen Layout

MarketWare Version 10 follows the concepts you are familiar with by modeling our interface after Microsoft Office 2007.

Main Menu: Located at the top of the program includes Menus Home, Document, Tools, Reports, and Help. Each Ribbon Menu contains information relevant to the name of the Menu.

View Menu: Located on the Left Side of the screen, the View Menu allows you to switch between the Database, List, Today, Calendar, Tasks, History and File Cabinet Views.

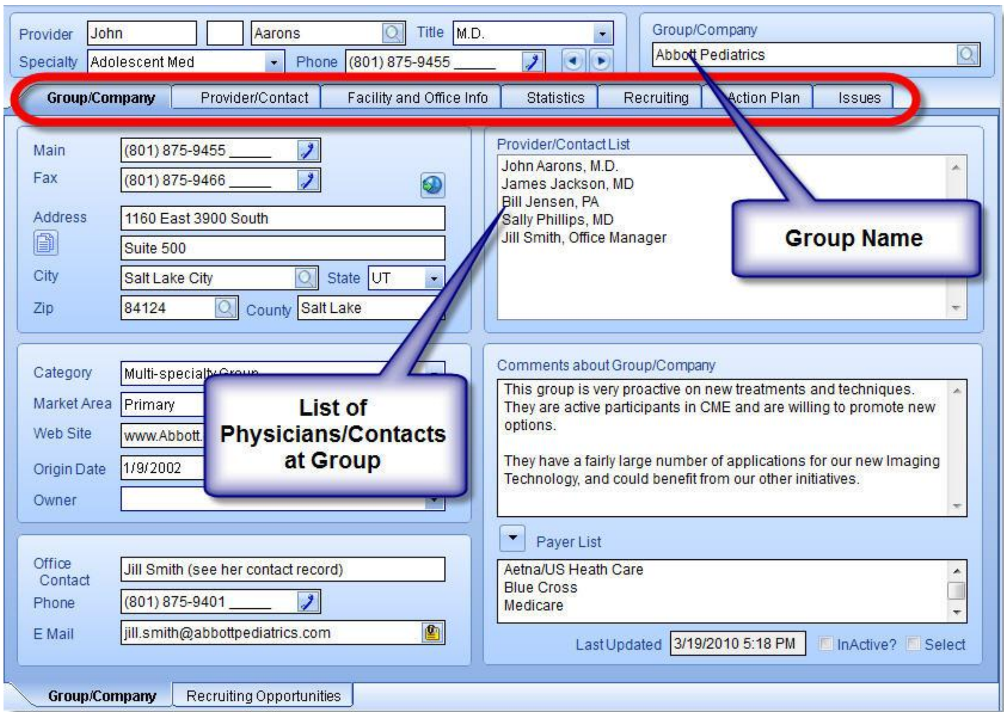
Main Window: The Main Window of MarketWare Displays the Active View that is selected from the View Menu on the Left Side of the Screen.



Menu

Understanding How the Database is organized

When you view the initial page of the database, or **Group/Company** page, you'll see basic information about the group and a list of physicians/office staff that are associated with that group. (See Below). You will also noticed 7 pages/tabs that contain information related to the Group and Physician's/Office Contact that is listed at the top of the screen

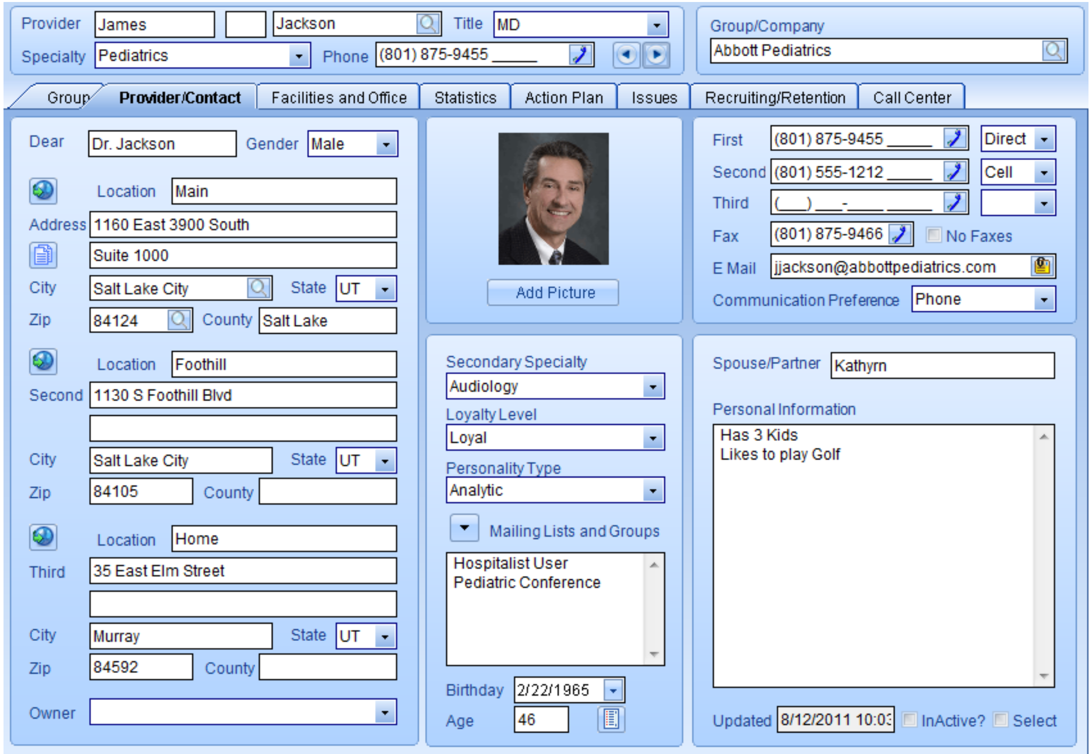


Please note the following about the Group/Company page:

1. Comments about the Group are intended to be general. A complete set of History and Notes are available for you in the History View (covered later).
2. If the Group has more than one office, you should click the Multiple Locations checkbox. (You can see the additional offices by observing the addresses on each physician's record).
3. The Category field can be used to "classify" groups into any user-defined categories.
4. The Market Area field can be used to identify what user-defined market areas you need to assign the group into, i.e., Primary, Secondary, etc. Or it can be used to identify which hospital within your group of hospitals is where the physician/group dedicates most of their time, or provides the most referrals, and therefore should take the lead in managing the relationship.

5. The “owner” field can be use to control access to the record, or to identify the user who is primarily responsible for the overall relationship with the group.

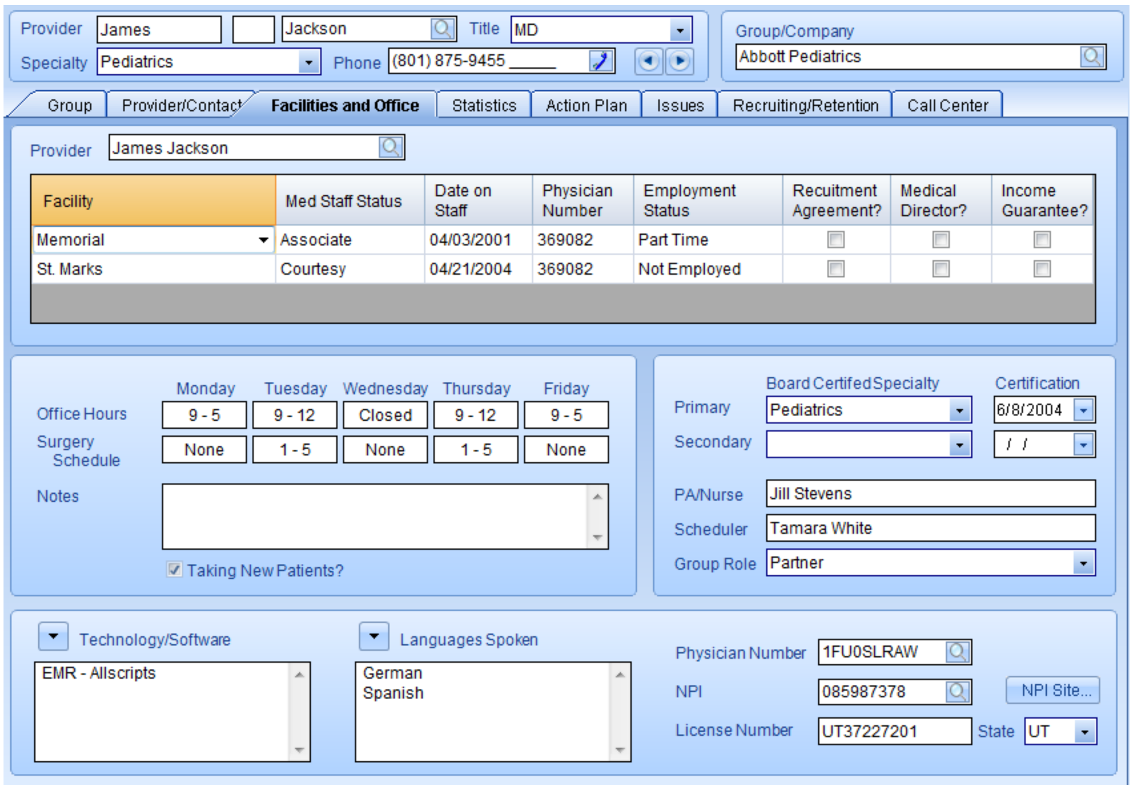
The **Provider/Contact** page displays the “demographic” information about a physician/office contact. It includes basic address, phone, email information, picture, etc.



Please note the following about the Provider/Contact page:

1. Each physician can be assigned up to two specialties, primary and secondary. You can select these from a drop down box.
2. By clicking on the  Google Maps Icon, the system will take you to the Google Map website and display a map of the Physician’s address.
3. Mailing Lists are intended to be used to assign a physician to various lists. These lists can be used to send out mailings and mass email messages, or group the physician any way that is most appropriate. Just click the Mailing Lists  button to display a list of standard lists. You can check as many from the list as you want. Once checked, click off the field to close the selection window.
4. The picture can be obtained via either a .jpg, .gif or .bmp type file created by a digital camera.
5. Use the Select checkbox to “tag” a record for batch processing. For example, you can send an email to all “currently selected” physicians.
6. Use the InActive Checkbox to indicate Physicians that are InActive (Moved, Retired, etc.)

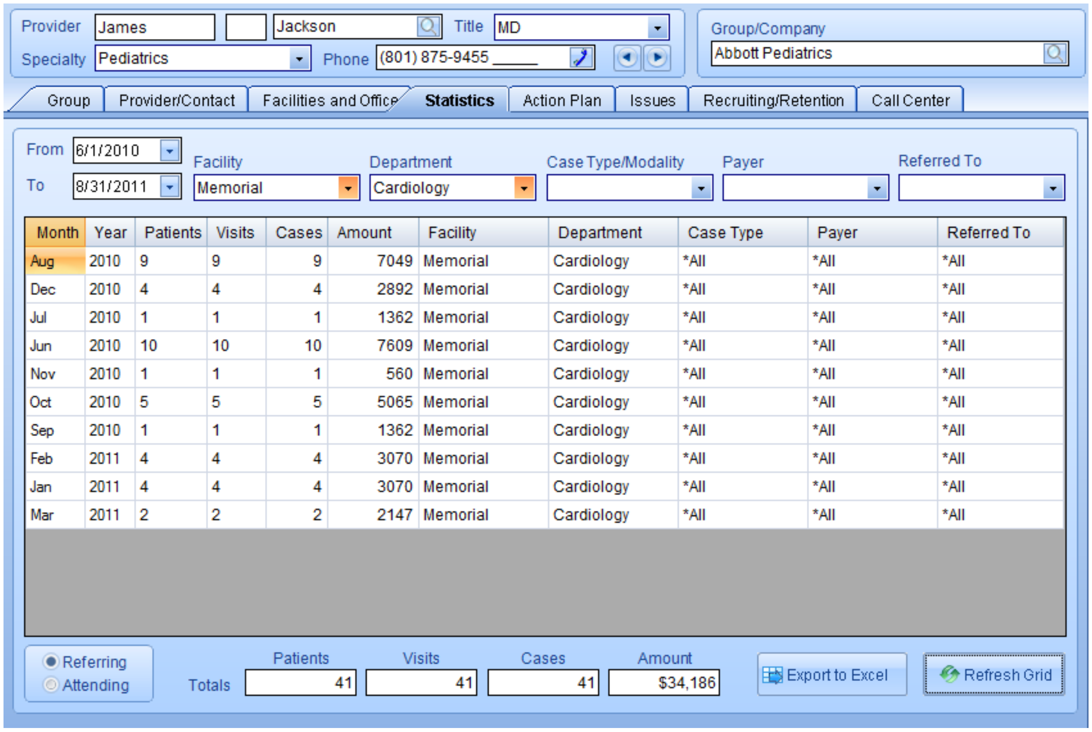
The **Facility & Office Info** page is used to identify any agreements the physician has entered into with your facility. It includes which Facilities, Current Med Staff Status, Date on Staff, etc. You are also able to identify office hours, Technology at the office that links them to your organization, as well as identifying which physicians that physician refers patients to. (See Below)



Please note the following about the Facility & Office Info page:

1. The Physician Number, NPI and License number fields are frequently used as "keys" in order to allow updates from outside of MarketWare. For example, by including the physician mnemonic from Meditech®, you can more easily download statistical data into MarketWare and correctly match it to the physician (i.e., place the mnemonic in the Physician Number field). You can have either one overall physician number key or one for each facility, if different (see grid above).
2. List each Facility your physicians refer to, this could be your facility or other area hospitals or other competitors.

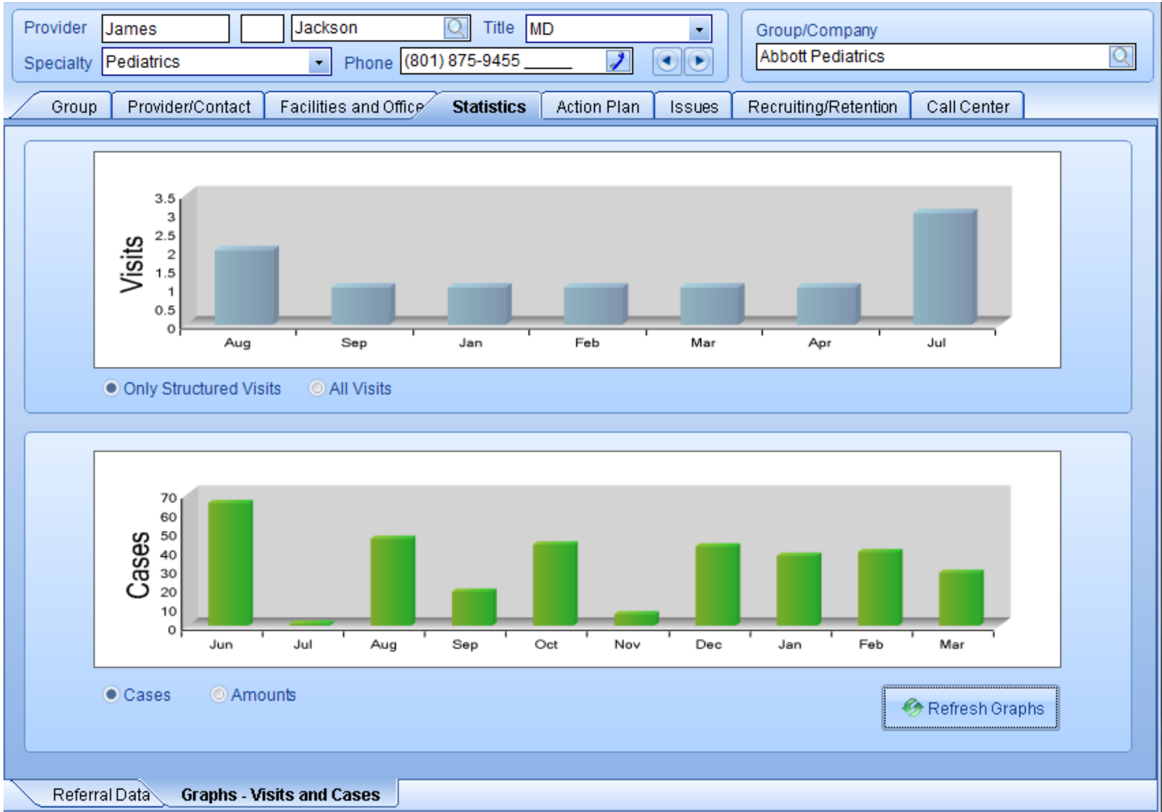
The **Statistics** page shows referral activity. The data is available if you've configured a link with an external accounting-type system like Meditech®, Cerner, Star, Epic, etc. This information is not intended to be updated manually, but through the use of the Import Wizard. (See Below)



The Statistics Screen has a Two Sub-Pages.

Referral Data – Displays Volumes by month, by Facility. Use the Drop Down Boxes to view the data you are interested in.

Graphs – Visits and Cases – Displays Graphs Representing the Data on the Referral Data Tab. (See Below)

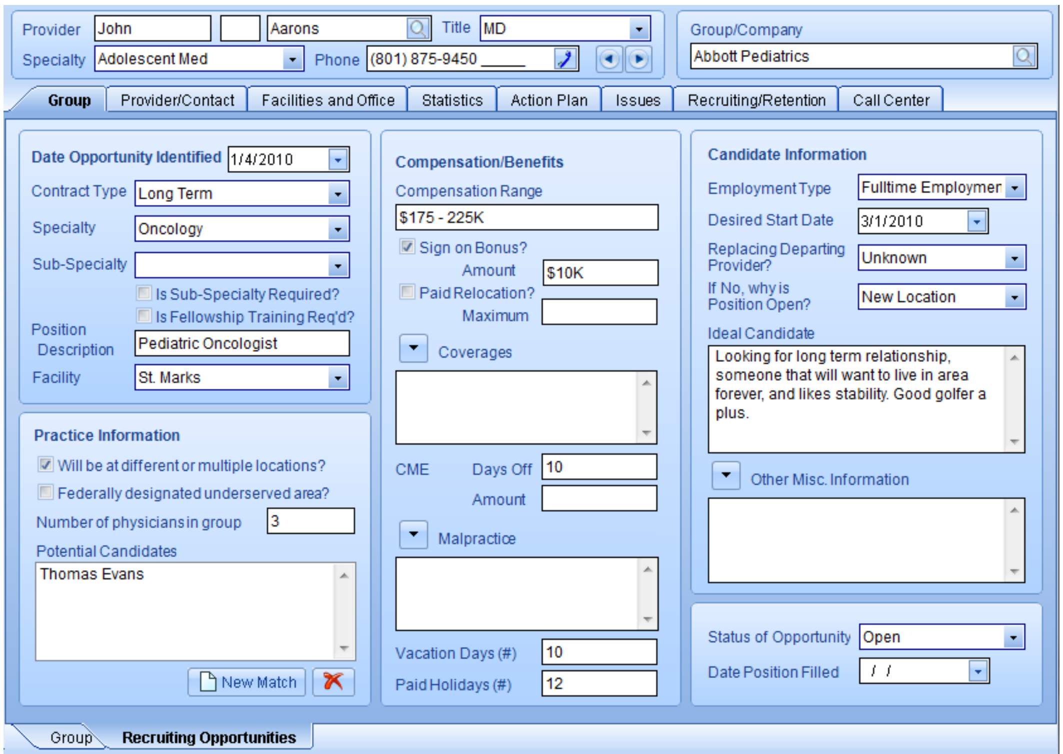


NOTE: The above pages deal primarily with "demographic" information about the Group and Physicians, the rest of the pages deal with the "Proactive" and "Reactive" side of your relationship with the Physicians. To see a full size version of the graph, just right click the graph.

Recruiting Physicians

MarketWare has incorporated Practice Development and Physician Recruiting.

Practice Development: On the Group/Company page there is a sub-page similar to the Statistics screen – you can access the Recruiting Opportunities page by clicking on the page at the bottom of the Group/Company page.

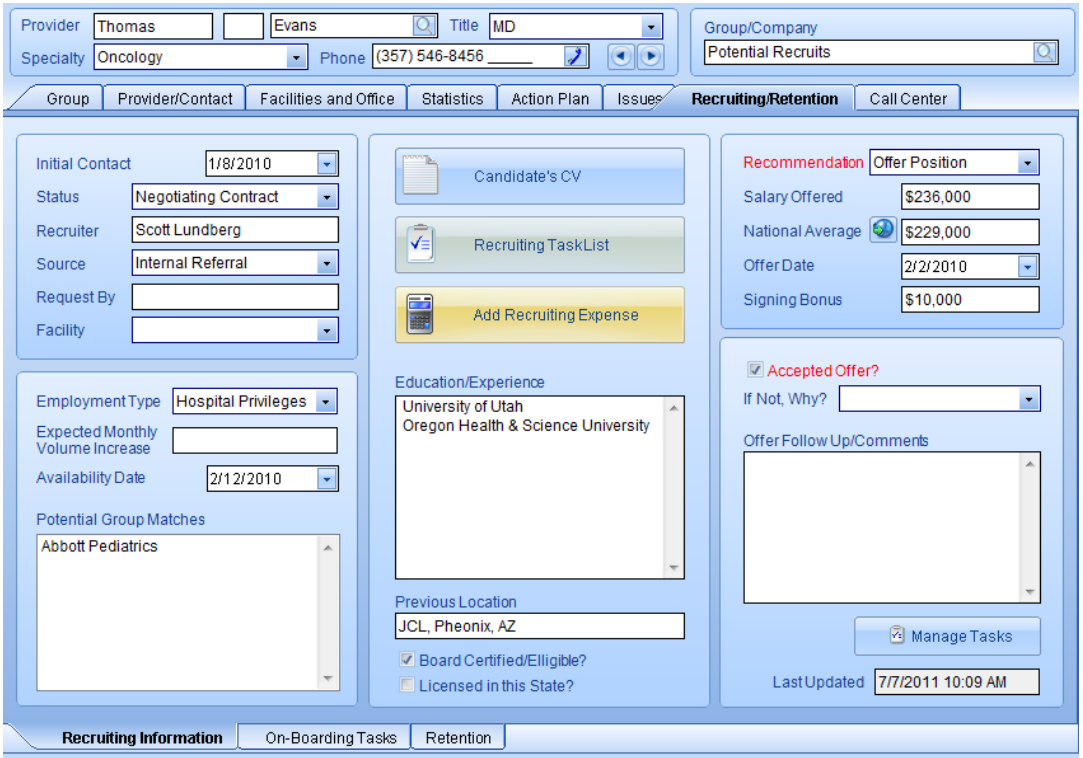


The Recruiting Opportunities page allows you to identify the physician that the group wants to add to their group, you are able to identify what is being offered, what the "ideal" candidate would be, and link Potential Candidates to that particular Opportunity. Each group can have multiple opportunities.

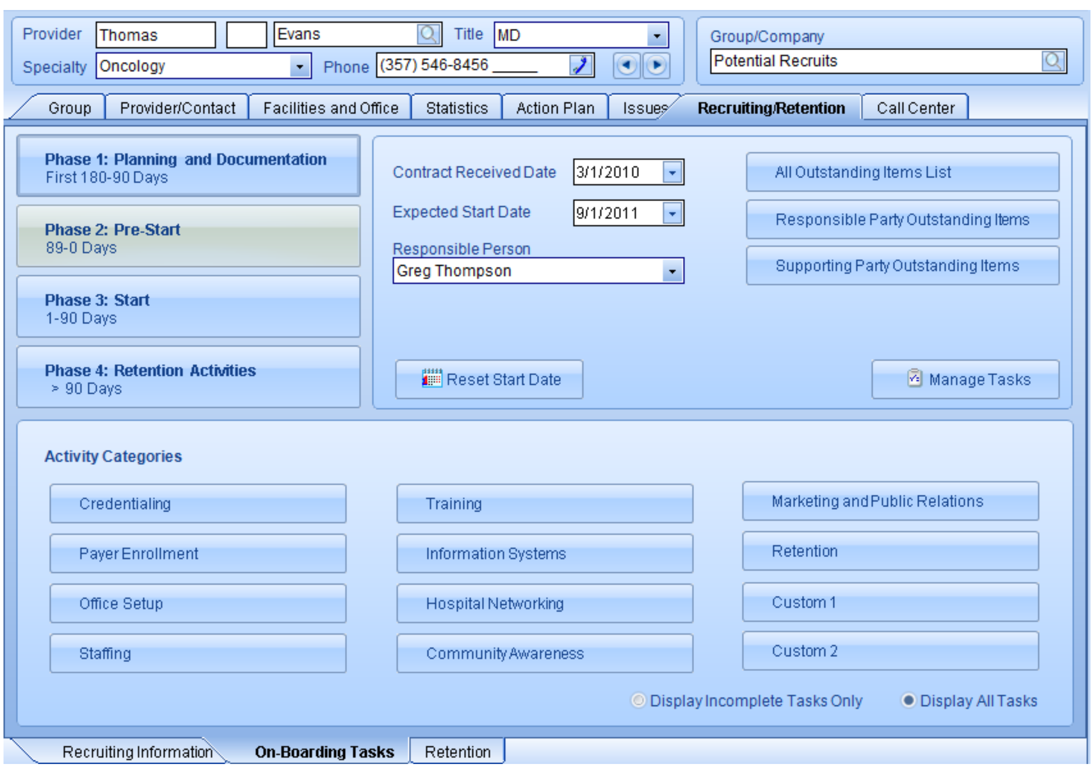
Recruiting – Sourcing, Site Visit, On-boarding/Retention

The recruiting process is broken out on 3 separate sub pages on the Recruiting page in MarketWare.

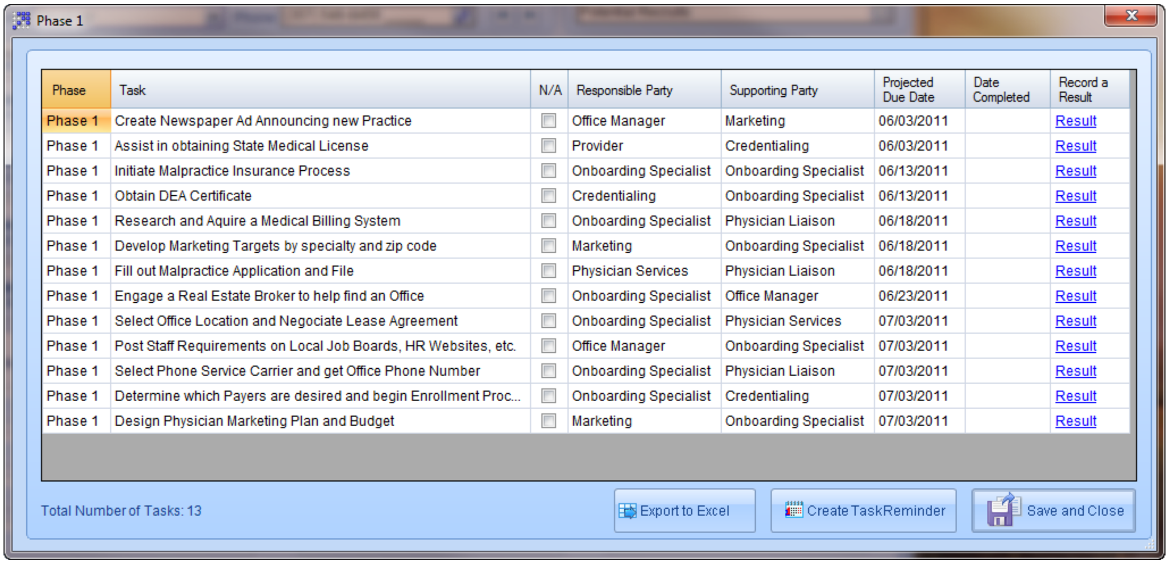
Recruiting Information – allows you to track the initial information gathered about the potential recruit.



On Boarding Tasks – allows you to all of the tasks required for On-Boarding.

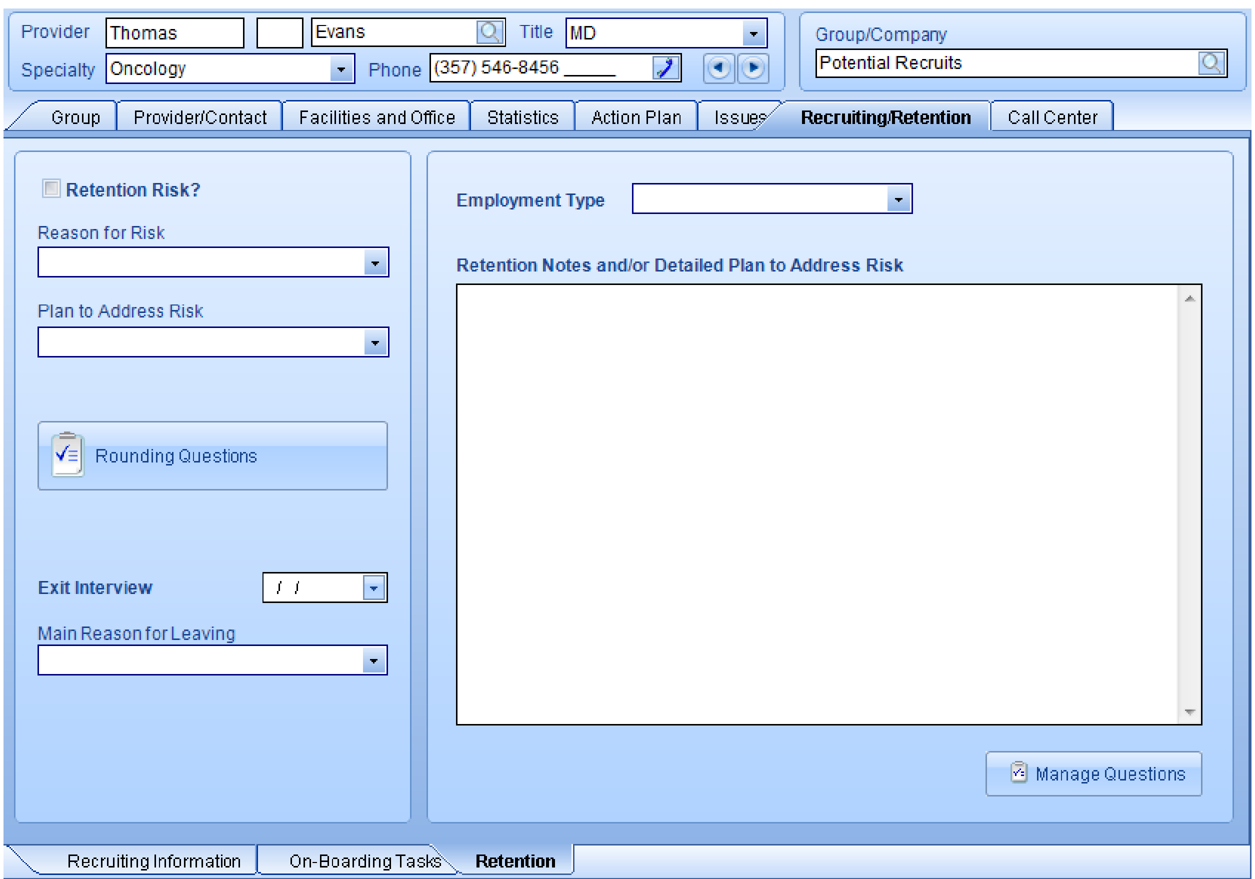


On Boarding Task List – This list provides the details of each task within a Phase, Category, etc.



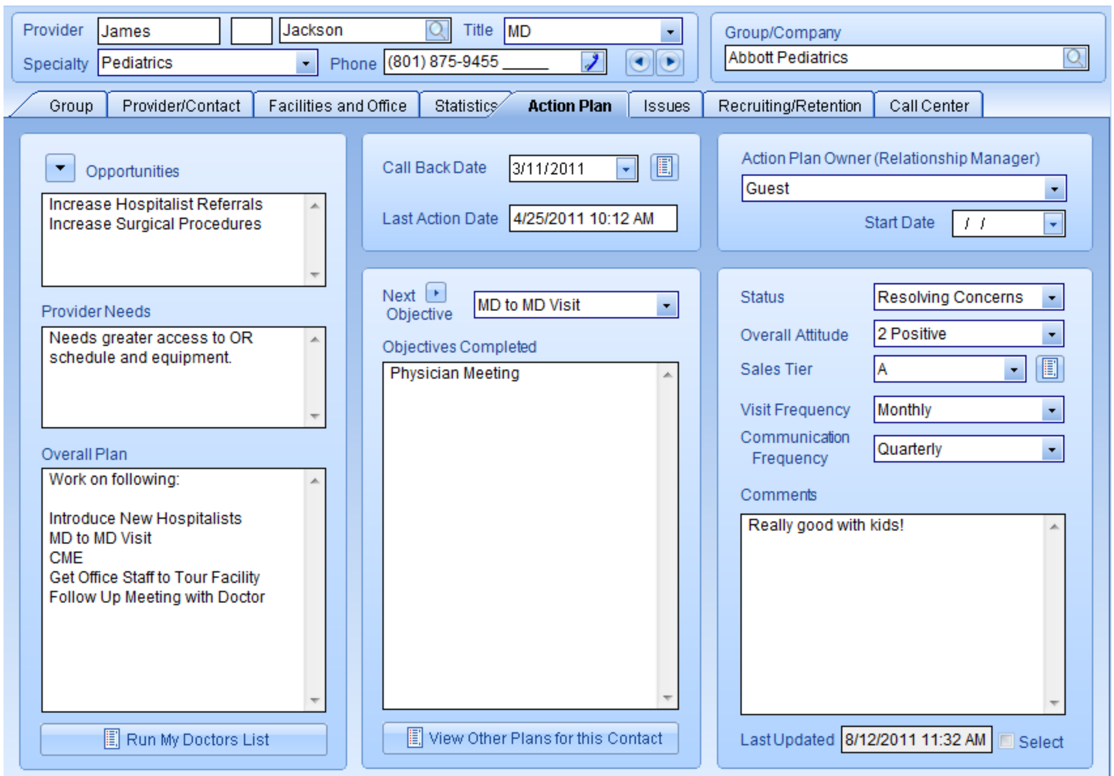
Phase	Task	N/A	Responsible Party	Supporting Party	Projected Due Date	Date Completed	Record a Result
Phase 1	Create Newspaper Ad Announcing new Practice		Office Manager	Marketing	06/03/2011		Result
Phase 1	Assist in obtaining State Medical License		Provider	Credentialing	06/03/2011		Result
Phase 1	Initiate Malpractice Insurance Process		Onboarding Specialist	Onboarding Specialist	06/13/2011		Result
Phase 1	Obtain DEA Certificate		Credentialing	Onboarding Specialist	06/13/2011		Result
Phase 1	Research and Aquire a Medical Billing System		Onboarding Specialist	Physician Liaison	06/18/2011		Result
Phase 1	Develop Marketing Targets by specialty and zip code		Marketing	Onboarding Specialist	06/18/2011		Result
Phase 1	Fill out Malpractice Application and File		Physician Services	Physician Liaison	06/18/2011		Result
Phase 1	Engage a Real Estate Broker to help find an Office		Onboarding Specialist	Office Manager	06/23/2011		Result
Phase 1	Select Office Location and Negociate Lease Agreement		Onboarding Specialist	Physician Services	07/03/2011		Result
Phase 1	Post Staff Requirements on Local Job Boards, HR Websites, etc.		Office Manager	Onboarding Specialist	07/03/2011		Result
Phase 1	Select Phone Service Carrier and get Office Phone Number		Onboarding Specialist	Physician Liaison	07/03/2011		Result
Phase 1	Determine which Payers are desired and begin Enrollment Proc...		Onboarding Specialist	Credentialing	07/03/2011		Result
Phase 1	Design Physician Marketing Plan and Budget		Marketing	Onboarding Specialist	07/03/2011		Result

Retention – Identifies Retention Risk and how you plan on addressing the risk, etc..



Action Plan

The **Action Plan** page is used to manage your “Proactive” goals, objectives, etc. with each physician. The information on this page helps you to stay on top of “what to do next”, and where you are in the relationship process. (See Below)



Please note the following about the Action Plan page:

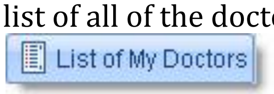
1. Use the Define Opportunity box to identify what you would like to achieve with this physician. This is not limited to a single goal. You can fill in as much information as you need to clearly identify your goals.
2. Use the Overall Plan box to fill in your plan for working with this physician to reach the above goals/opportunities. This plan may require you to do many activities over the next 6-18 months.
3. After your initial visit with the physician, you’ll want to note what Benefits are required before they will move forward, use the Benefits Required by Physician to record these, and refer to them often so that you stay on track with what you must provide the physician in order to succeed.
4. Each Goal/Opportunity may require a number of “Actions/Objectives” to complete. It’s like eating an elephant; you can’t do it in just one bite. As a result, you’ll want to identify each objective along the way.
5. When you complete a visit with the physician where you’ve worked on an objective, record the Results of your Call, Meeting, etc. Use the “Record Results” button on the Main Menu to do so (see Right). The

results will be recorded in the history so you have a complete record of every thing you've done (and everyone else will have a heads up). You can then click on the  button to move the Next Objective down to Objectives Completed.

6. In any relationship process, you go through different "stages", the Status field identifies where your physician is at any point in time. By its nature it signals what's been done so far. For example, if you're status levels are 0 Lead, 1 Qualification, 2 Presentation, 3 Proposal, etc. then, if the physician is at the 2 Presentation Status, you know you've already had a Qualification discussion, and made a Presentation.
7. The Overall Attitude field allows you to gauge how the physician feels about you and your organization. It's a barometer to gauge how positive he/she is.
8. The Sales Tier box is used to classify the physician's current referral volume. You know the old 80/20 rule, 20 percent of the physicians provide 80 percent of the referrals. This field allows you to stay on top of those "A" Tier physicians, in fact, we have a special Quick List on the menu so you can get a list of all of your "A" Tier Physicians at the click of a mouse. (Note: use your own rules to define which physicians qualify for A, B, C, etc. status).
9. The Comments box was placed here because we were worried you might not have enough room for all the things you want to keep track of in relation to physician. ☺ Use it as you see fit.

Creating a new Action Plan record for a Physician

1. Adding an action plan record is very simple, just click the 

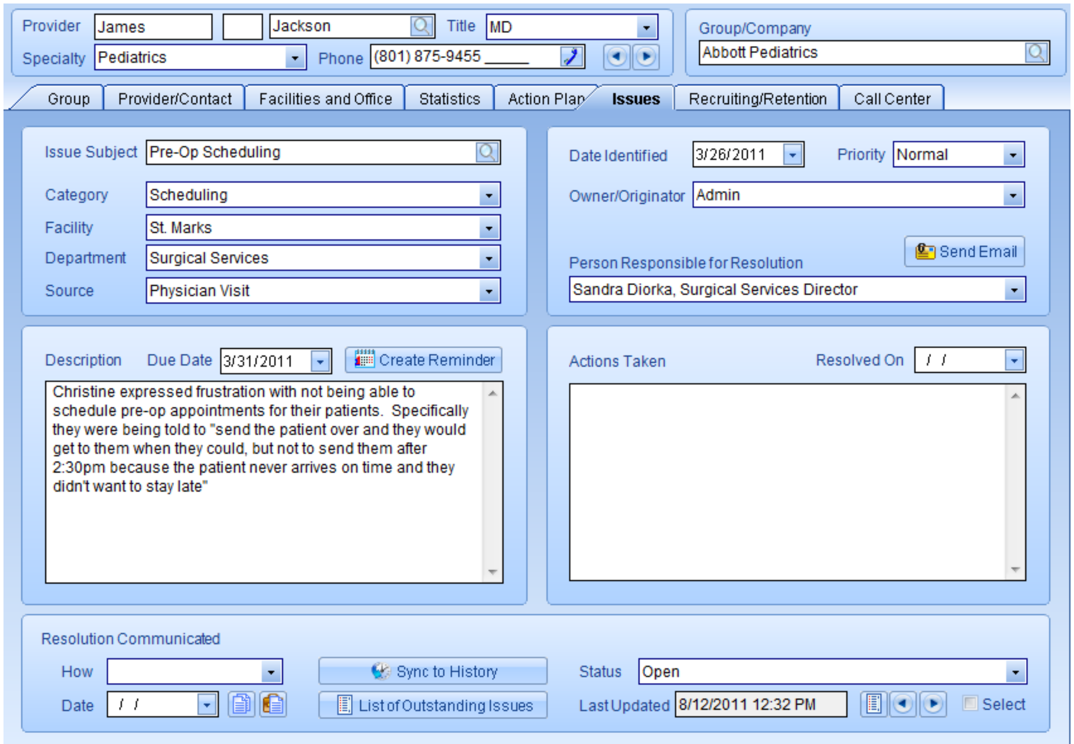
button on the View Menu, and Select "Action Plan". You will be adding an Action Plan for the Physician listed at the Top of the Database View, so be sure that is the Physician you want the Action Plan with.
2. The screen will clear, and you will see your user name in the upper right hand corner. At this point, just fill in the remaining fields and you are done.
3. To see a list of all of the doctors for whom you've created an action plan record, just click the 

button.
4. If you need to download your list of doctors and take them with you, disconnected from the central database and network, just click the 

button.

Issues

The **Issues** page will help you manage the resolution of problems that arise as a result of your interaction with the physician, i.e., they will frequently tell you things that they are concerned with, and using this tool you can setup a “Stewardship” to get the problems resolved. (See Below)



Please note the following about the Issues and Problems page:

1. To add a new issue, first lookup the physician that the issue is associated with, and then press the 

button on the View Menu and select “Issues”.
2. You will be adding an Action Plan for the Physician listed at the Top of the Database View, so be sure that is the Physician that has the issue.
3. When you create a new issue, you need to fill-in a one-line subject “description” of the problem. This allows you to view a list of issues in a grid-type format. Then once you’ve identified the problem, give a detailed description in the Description field.
4. The current date will default to today’s date. You can change it if desired. The status will also default to “Open”. Select a category; this is used in reports to give you a summary of how many issues are occurring in what general categories.
5. Assign a responsible person. This is the person who has the responsibility to handle these types of problems. Also, give the responsible person a due date for taking action.

6. Once you've filled in all the appropriate fields, you can notify the responsible person via email by clicking the 

button. An email message filled-in with all of the information relevant to this issue will be displayed, giving you the ability to add additional comments or select any other persons for carbon copies (cc). (See Below)
7. Once the Issue has been resolved, make sure you notify the physician and record how you notified him/her and when.

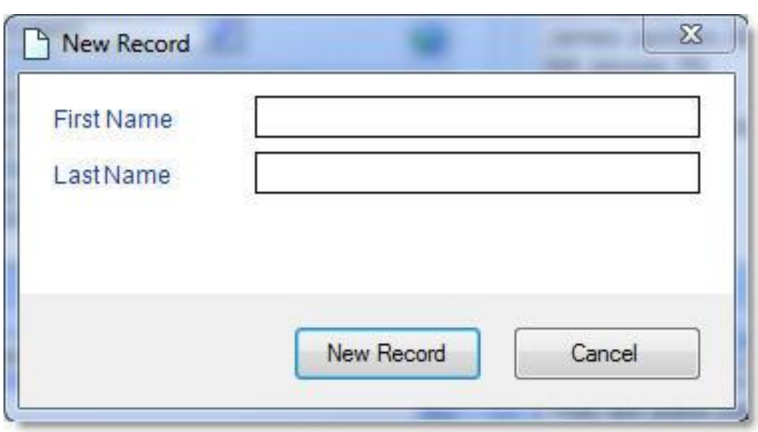
Adding a Physician/Contact to the Database

In this section you will learn how to add a physician to the database. (NOTE: Typically we will work with you to import the majority of your physician data, however, occasionally; you'll need to add a new physician manually; for example, when you meet a new physician who has just moved into the area.)

Adding a Physician, Action Plan, Issue or even a Group is very straight forward. First you must determine the entity you wish to add and then press the New Button on the View Menu.

The only trick to completing this type of operation is that you must make sure that you currently have the right "parent entity" displayed before you begin. For example, before adding a Physician you need to display the Group that the physician is associated with first, which may require looking up the Group using the Search Tool (see below).

Once you have the associated "parent" entity displayed, you are ready to add the record. In the case of Adding a new Physician/Contact, when you click the New Button you will be prompted for first and last name of the physician, once you enter this information and click the "New Record" button, the provider/contact page will be cleared, the new name entered and you will be able to fill-in the remaining information about the physician.



The procedure for adding any other "entity" is the same, with the exception of adding a new Group. Since the Group is the upper-most parent entity, there is no need to "look-up" a related entity before adding a new child entity as you would if you were adding a

physician, action plan or issue, etc. To add a new Group, just click the New Button on the View Menu and Select "Company", fill in the Group name and click the "New Record" Button as you did above. The Group/Company page and all other windows will clear allowing you to add the new information.

Adding or Deleting Records

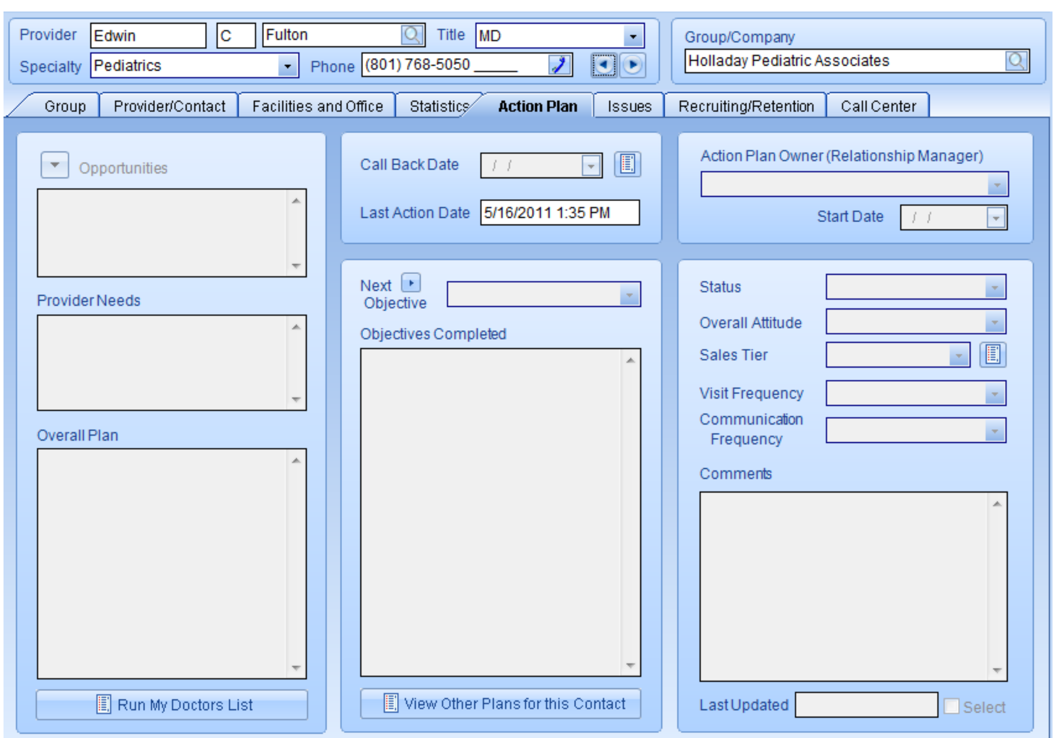
You can add any entity, i.e., Group, Physician, Action Plan, Issue, etc. assuming the Database Administrator has given you permission to do so. Likewise, you can delete a currently displayed entity by clicking the 

delete button from the View Menu and selecting the entity you wish to delete.

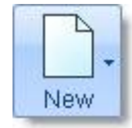
(PLEASE NOTE: Any record that is deleted from MarketWare also deletes all records "Below" that record. For instance; if you delete a Physician; all History, Issues, Action Plans, etc. will also be deleted. If you delete a Group; all Physicians, History, Issues, Action Plans, Expenses, etc. at that group will also be deleted.

Blank Information Windows (Pages)

When you see a blank information window (see below) the system is telling you that a "child" entity does not exist for the currently displayed "parent" entity. In the example below what you are seeing is a Physician who currently does not have an Action Plan created. Another characteristic of this page is that you can not click your mouse into any of the "grayed-out" boxes on the page.



However, after clicking the New Button the window will change allowing you to enter information for the Action Plan. You must tell the system by clicking the New Button that you want a child record to be created; the system will not assume you want this done this automatically.



Finding Information in the Database

In this section you will learn how to find information in the database (typically how to lookup a Physician or Group).

The Search Tool

The basic need for all users is to find a specific physician, group, etc. quickly and easily. The Search tool makes that possible. We will show you how to find Physician, etc. using this tool and work through a number of examples, i.e., find a Group, look up someone using their last name, phone number, etc.

To use the Search tool on the Main Menu to find a physician, do the following:

1. Select the Table and the Field you want to search.
2. Type the name or just a part of the name in the search for Box, and either click  or Press Enter.
3. A list of all physicians who match that name will appear in the List View.

		Last Name	Name	Company Name	City	State
▶	View	Smith	Anna Smith	Utah Anesthesia Consultants	Provo	UT
	View	Smith	Jill Smith	Abbott Pediatrics	Salt Lake City	UT
	View	Smith	Steve Smith	ABC Pediatrics	Salt Lake city	UT

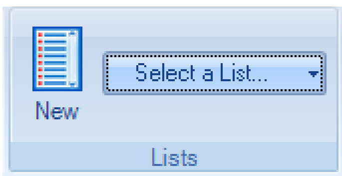
4. Click the “View” Link to go to that record (If it is the first Record you can also hit Enter to go to that record).

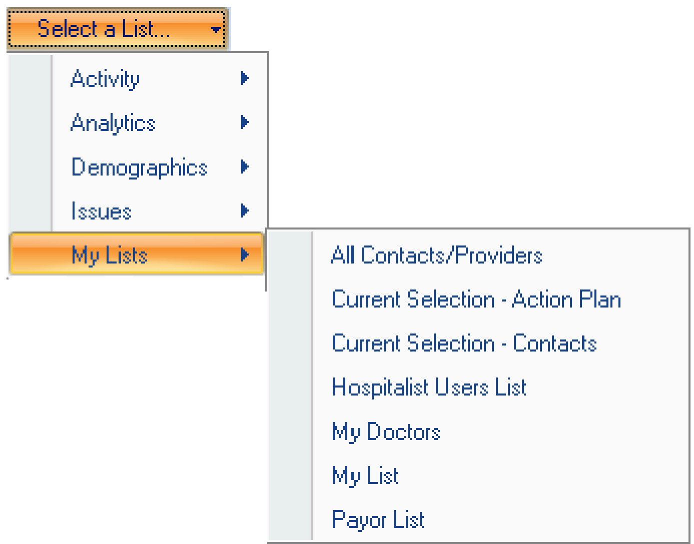
There are many ways to search for information using the Search Tool. You will notice that there are  buttons next to various fields in the database window. Each one of these buttons are “topical” i.e., they relate to the field they are connected to. When clicked, a window will appear that will allow you to quickly search based off of that particular field.

Working with Lists

A List is a flexible tool that allows you to create lists based on almost any criteria. You can get a list of all the doctors you talked to last week, all Cardiologists, every Doctor in a set of zip codes, and on and on. In this exercise, we want you to become familiar with some of the "built-in" predefined queries, and then make some changes to those queries to fine tune them for your specific needs.

You can find the pre-defined Lists on the Main Menu. (See Below)





My Doctors Quick List

The "My Doctors" Quick List selects all Doctors who have been "Assigned" to you. The assignment is done by creating an Action Plan and assigning you as the Owner (Relationship Manager) on the Action Plan page. To run this List, select My Doctors from the Quick List menu (See Above). The query will run, display the number of records selected, (See Below)

NOTE: This specific quick list is also available with one click 

on the Action Plan Page.

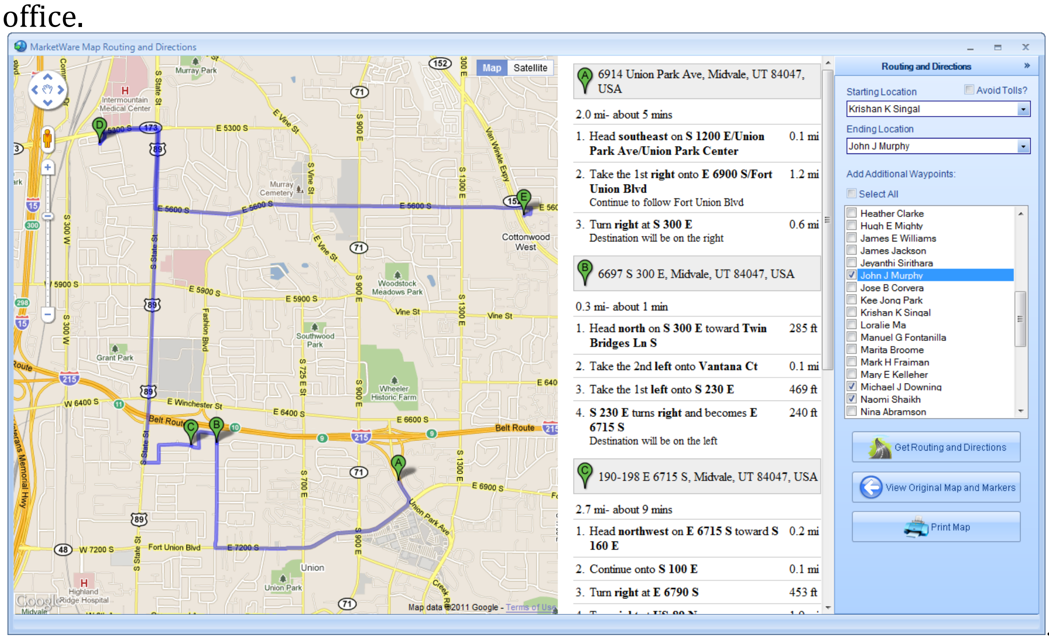
And then the system displays the List View.

	Select	Name	Specialty	Visit Frequency	Company Name	Last Name
View	☑	John Aarons	Adolescent Med	Monthly	Abbott Pediatrics	Aarons
View	☐	Hatem S Abdo	Internal Medicine	Monthly	Abdo Family Practice	Abdo
View	☐	Rifat Abousy	Family Practice	Monthly	Abdo Family Practice	Abousy
View	☐	Nina Abramson	Cardiology	Quarterly	Abramson, Nina MD	Abramson
View	☐	Jaime Accinelli	Family Practice		Accinelli, Jaime MD	Accinelli
View	☐	Elizabeth Adegboyega-Panox	Anesthesiology		Anesthesia Associates	Adegboyega-F
View	☐	Ethel Adeloye	Anesthesiology		Anesthesia Consultants	Adeloye
View	☑	Nnaemeka Agajelu	Anesthesiology		Utah Anesthesia Consultants	Agajelu
View	☐	Ashok Agrawal	Urology	Quarterly	Alpine Urology	Agrawal
View	☐	Ruth Agwuna	Obstetrics & Gynecology		Kacie's Women's Center	Agwuna
View	☐	Navneet Ahuja	Pediatrics		Wasatch Pediatrics	Ahuja
View	☐	David B Aiello	Family Practice		Aiello, David MD	Aiello
View	☐	Salem Al-Naber	Pediatrics		Willow Creek Pediatrics	Al-Naber
View	☐	Samuel Alaish	Obstetrics & Gynecology	Semi-Annually	Alaish, Samuel MD	Alaish
View	☐	Carlos A Alarcon	Dermatology		Draper Center for Dermatology & Laser	Alarcon
View	☑	Aaron s Berkman	Nuclear Medicine		Berkman, Aron MD	Berkman
View	☐	Heather Clarke	Anesthesiology	Quarterly	Advanced Anesthesiology	Clarke
View	☐	Jose B Corvera	Cardiology		Corvera, Jose MD	Corvera
View	☐	Donna DeCosta	Gynecology		Advanced Gynecology	DeCosta
View	☐	Mayer Gorbaty	Surgery : Plastic	Semi-Annually	Advanced Images & Cosmetic Surgery	Gorbaty
View	☑	Richard Haar	Obstetrics & Gynecology		Haar, Richard MD	Haar
View	☑	Bill S Hager	Physical Medicine & Rehabilita		Advanced Spine & Sports Specialists	Hager
View	☐	James Jackson	Pediatrics	Monthly	Abbott Pediatrics	Jackson

Save Data Changes | Map List | Export to Excel | Take List Off-Line | Edit Query | Record Count 36

At the Bottom of the List View there are several things we can do with the List:

1. Make changes to the data on the List and save those changes.
2. Take the addresses and Map them using Google Maps
3. You can then select Contacts you are planning to visit and Map Directions to each office.



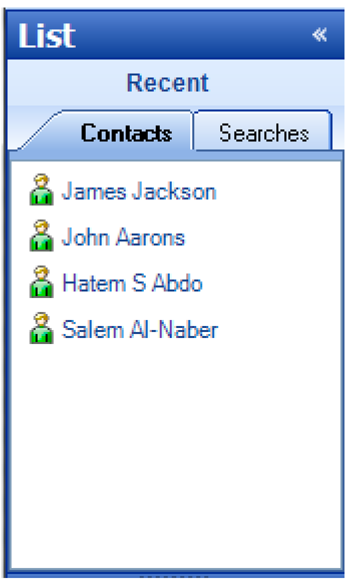
PLEASE NOTE: You must include the Contacts Name, Address_line_1, City, State, Zip, and Phone_number_1fields in the Selected Output Fields of your quick list for Google Maps to return the information required on the map.

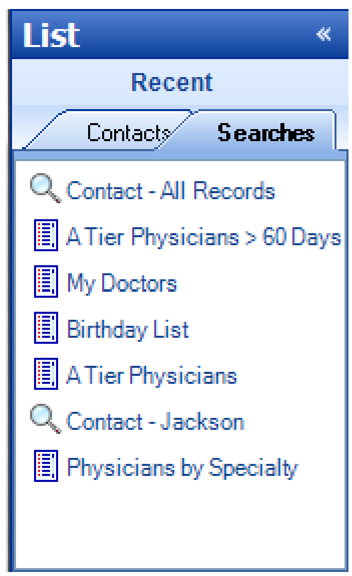
4. Export this list to an Excel File
5. Take the List Offline so you can access the data away from the Network
6. Edit the query and Change the Filters and Fields that are used for the list.
7. See how many records are included in this List.

Recent Searches/Lists

While on the List View you can see the recent Searches, and the Lists that you have run.

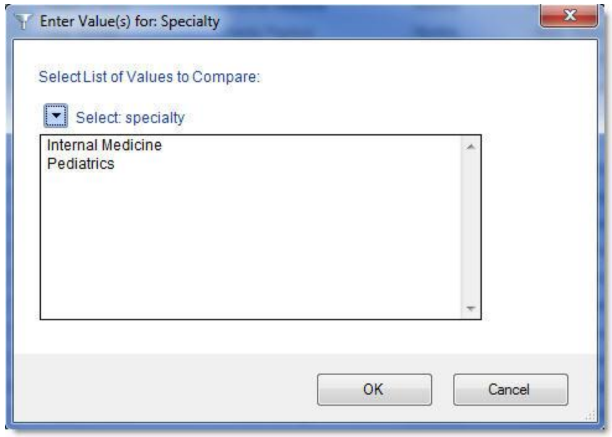
Items with a  List Icon are Recent Lists. Items with a  Search Icon are Recent Searches. Clicking on any of the items in this list will re-run the search/List. To access a contact you've displayed, select the Contacts List and click the name of the contact that was recently viewed.





Physicians by Specialty List

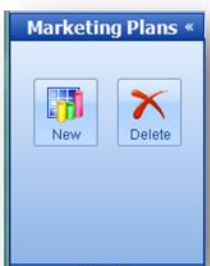
Select the Physicians by Specialty List. Notice that this list is different in that it prompts you for one or many specialties first, and then runs the List based on what you selected. (See Below)

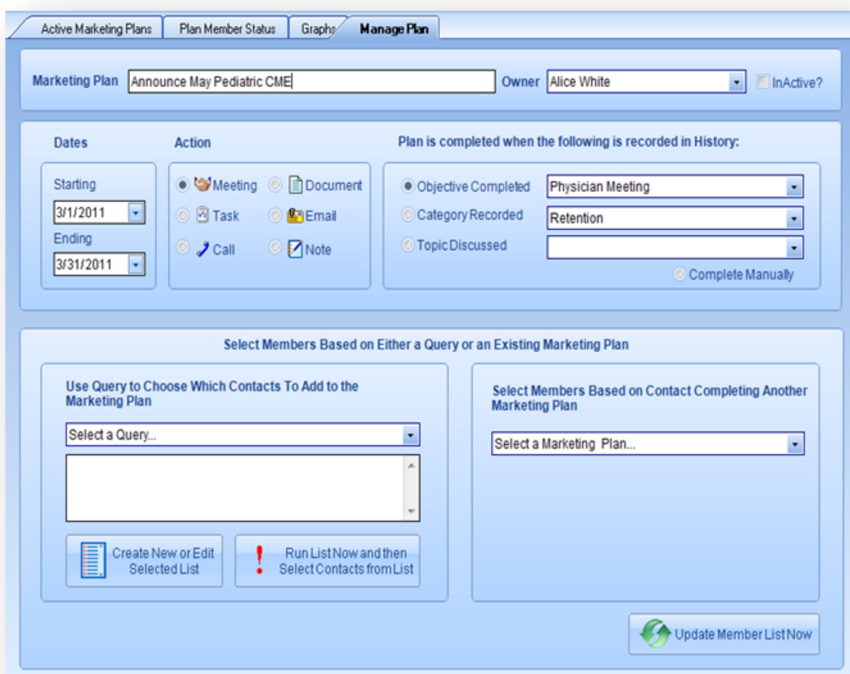


Select Internal Medicine and Pediatrics and then click OK. How many do you have?

Creating Marketing Plans

Creating a New Marketing Plan





To Create a New Marketing Plan Click the New Button on the right side of the Marketing Plans View, give it a unique descriptive name.

Once a Plan has been created, you will be taken to the Manage Plan Page.

Setting up your New Marketing Plan

1. Identify the time period for this Marketing Plan.

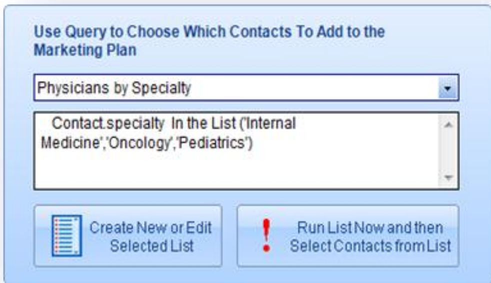
2. Identify the type of Action you plan on doing to accomplish this Marketing Plan.

3. Identify how you will identify when you have accomplished the task with a member of this Marketing Plan.

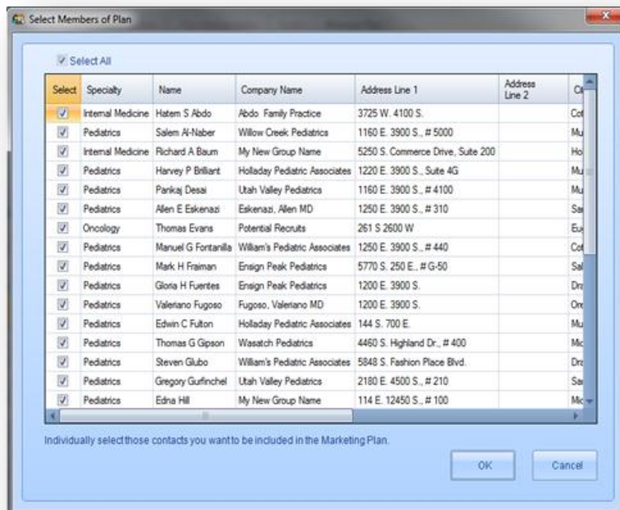
4. Identify the Members of this Marketing Plan.

There are two ways to identify members of a Marketing Plan.

1. Create a Query and select individuals from a Query



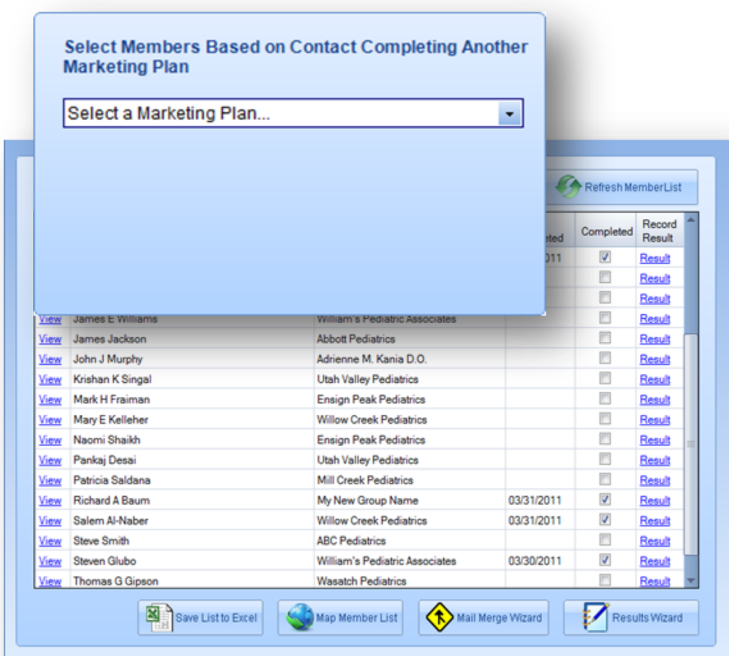
Select Any Existing List or Create a New List. Once the List is selected, click the "Run List Now and then Select Contacts from that List" button.



A Window will open up allowing you to further select or de-select individuals to be added to the Marketing Plan.

Once you click OK MarketWare will add the individuals to the Marketing Plan and take you to the Plan Member Status Tab.

2. You can also select Members Based on the Contact Completing another Marketing Plan. You can look at this being a Follow up activity or "Step 2" of another Marketing Plan.



Once you select Members in this Manner, Click

to update/generate your list of Members.

Plan Members Status

The Plan Member Status page helps you see the status of each

member of the plan. You can use this List of Member to:

1. View their record by clicking the View Link next to their name

2. Record a Result by clicking on the Result Link on the right

3. Mark the Date Completed for each Member manually by selecting a date and checking the Completed Checkbox.

You can also perform tasks for everyone on the list using the buttons at the bottom.

For example, you can Export this list to Excel, Map the List, Mail/Email everyone on this list, Record a Result for everyone on this list.

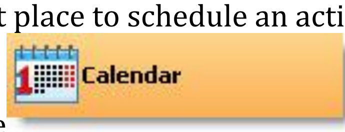
Setting Goals and Scheduling Actions with Physicians

As part of the goal setting process, you need to decide what you need to do, and what your next Action and Objective with the physician will be: Take the following Steps.

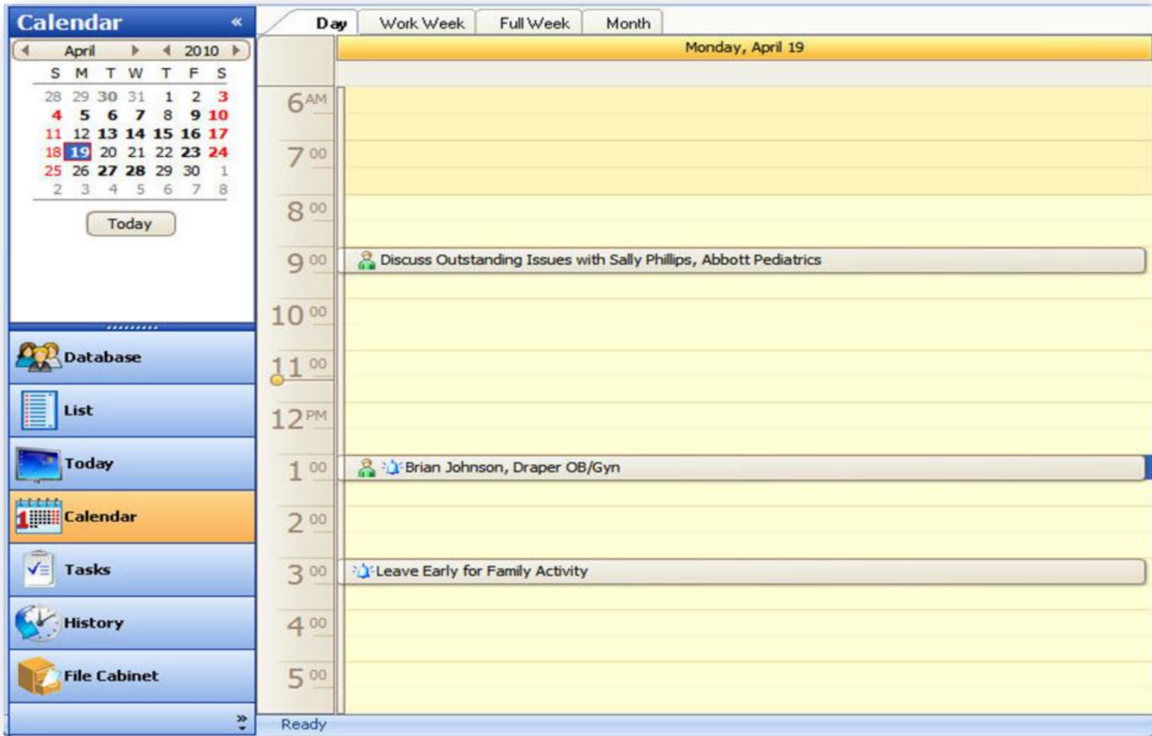
1. Look up a physician.
2. Fill in a Goal (Define Opportunity Box on the Action Plan Page.)
3. What is your Next Objective? Select the Next Objective from the Drop Down Menu.

Now that you have the objective defined, you need to **Schedule an Action** on the Calendar (Note: the MarketWare calendar works in conjunction with Outlook).

The best place to schedule an action is within the calendar itself.

Click the 

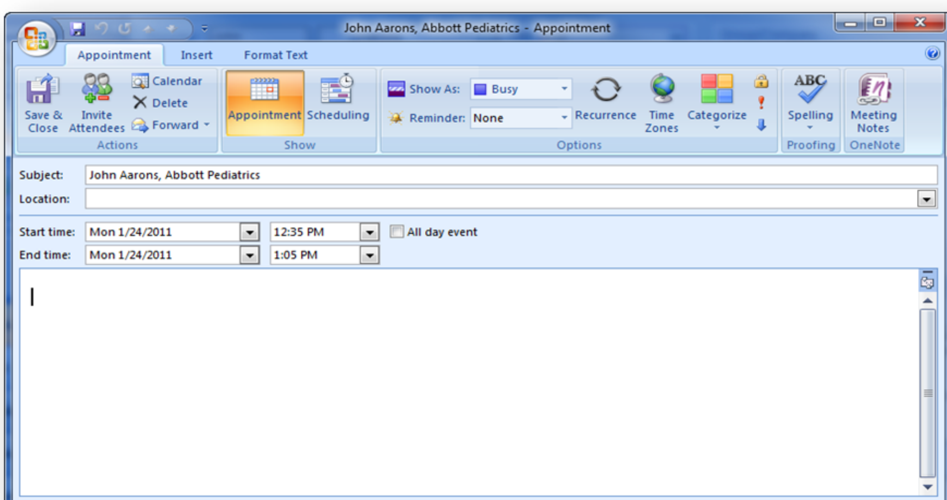
Calendar View button on the View Menu to display the calendar. The calendar view looks like the screen below:



Pick a date somewhere in the future to schedule an action with the currently displayed physician.

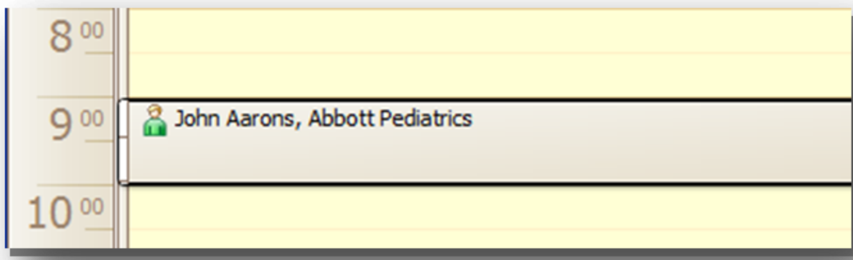
Take the following steps to schedule the action.

1. Double click on the area to the right of 10:00AM on the Day view.
2. The Schedule an Action Dialog will display. Please note that MarketWare will default to scheduling the action with the currently displayed physician (that's why we had you lookup physicians first, see above).



Fill in the appropriate information on the Schedule an Action window. Be sure to select your objective. Note that the "User" defaults to you (the currently logged in user), that means you'll be going out to meet with the physician.

3. When you've finished filling in all of the appropriate fields, click the Save button.
4. The action you just scheduled will now appear on the calendar. (See below)

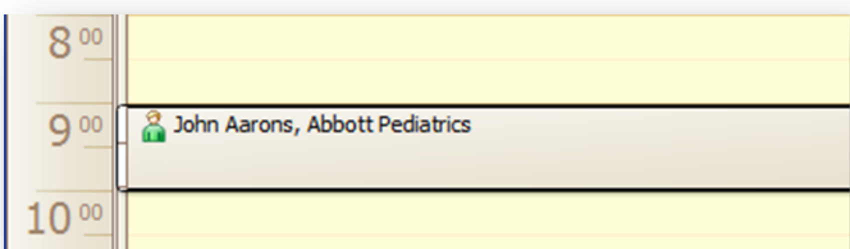


OK, now go have your meeting with Dr. Jackson. When you return from your meeting, you'll want to record the "results" of the meeting.

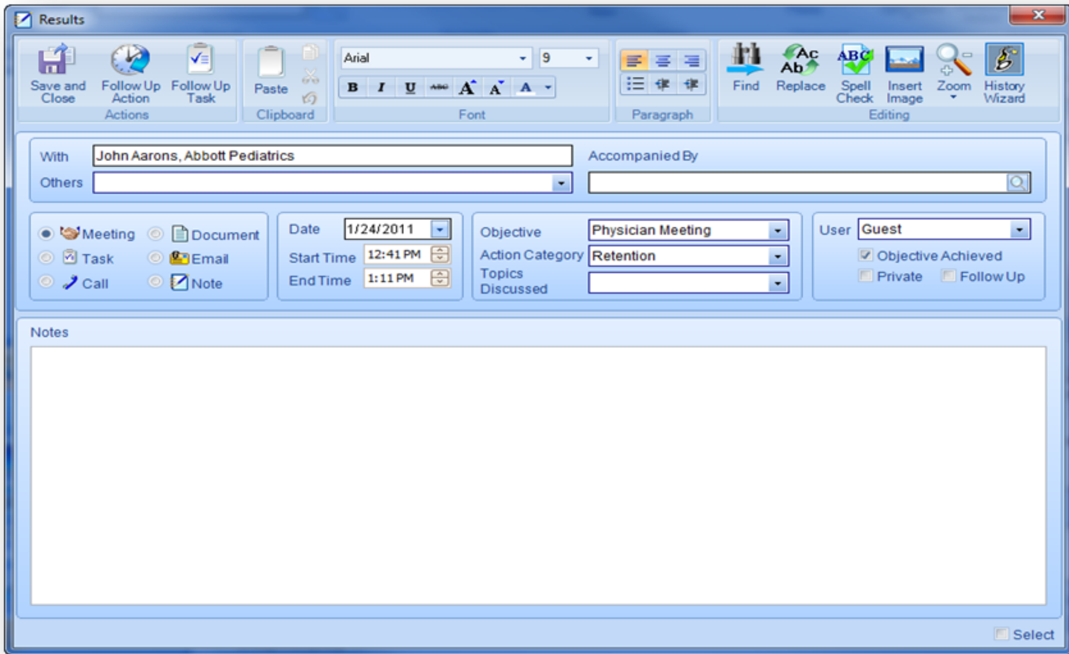
To **Record the Results** of a Call, Meeting or Task that you've scheduled on the calendar you'll need to take the following steps:

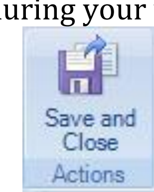
1. First, display the Calendar View. Click the  Calendar View button on the View Menu to display the calendar.

2. Click on the scheduled action. A bold border will display around the Action. (See Below)



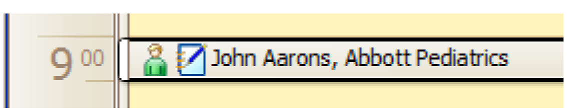
3. Now click the  button on the Main Menu, or Right Click the Action and select Results from the context menu. When you click on Results, the following window will display: (See Below)



4. The Results window will display and prompt you to identify the Results, and whether or not you've achieved your objective. You may also categorize your Action and List what was discussed during your visit. Once you've completed filling in the results of the meeting, click the 

button.

5. The "Result" is now in History. NOTE: You do not have to schedule an action on the Calendar to record a result. Only schedule actions on the calendar if you need to be reminded of the appointment. If you record a result from the calendar, the system will remind you that you've done so by displaying the calendar item like the example below:



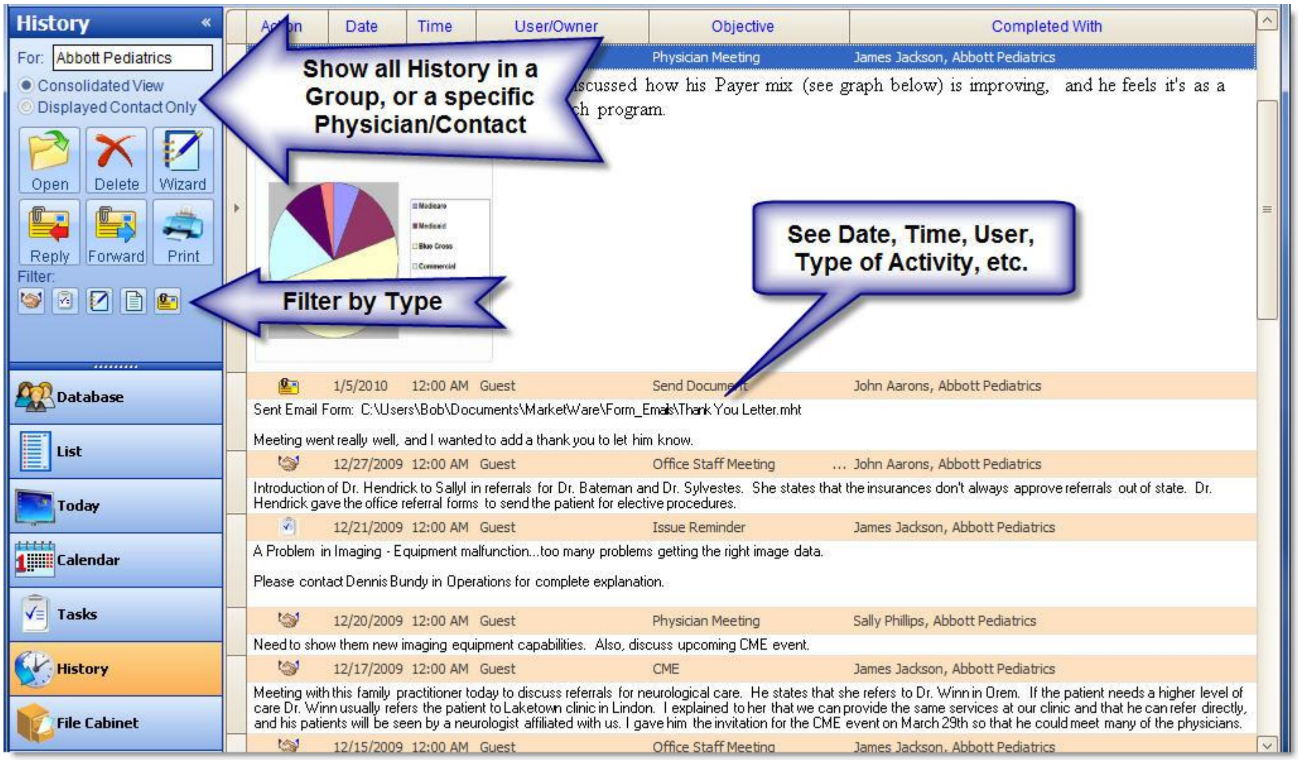
To display the **History** window to review all of the Results, Notes, etc. Do the following:

1. Look up a physician.

2. Display the History and Notes View by Clicking on the 

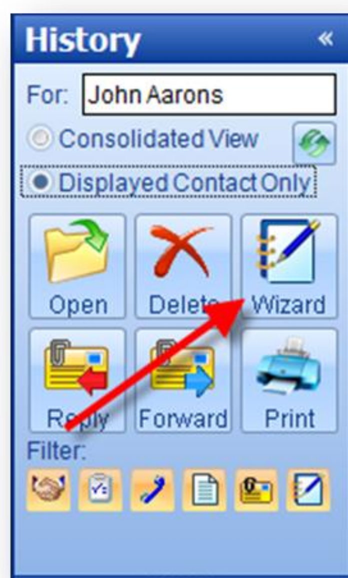
button on the View Menu.

3. The History Window will display. (See Below)



The History window has two basic modes: 1) Consolidated View, and 2) Displayed Contact Only. When you are in consolidated view, you'll see all activities for ALL physicians within the displayed Group. In Displayed Contact only, you'll only see the Results with the currently displayed Physician. To switch between these two views:

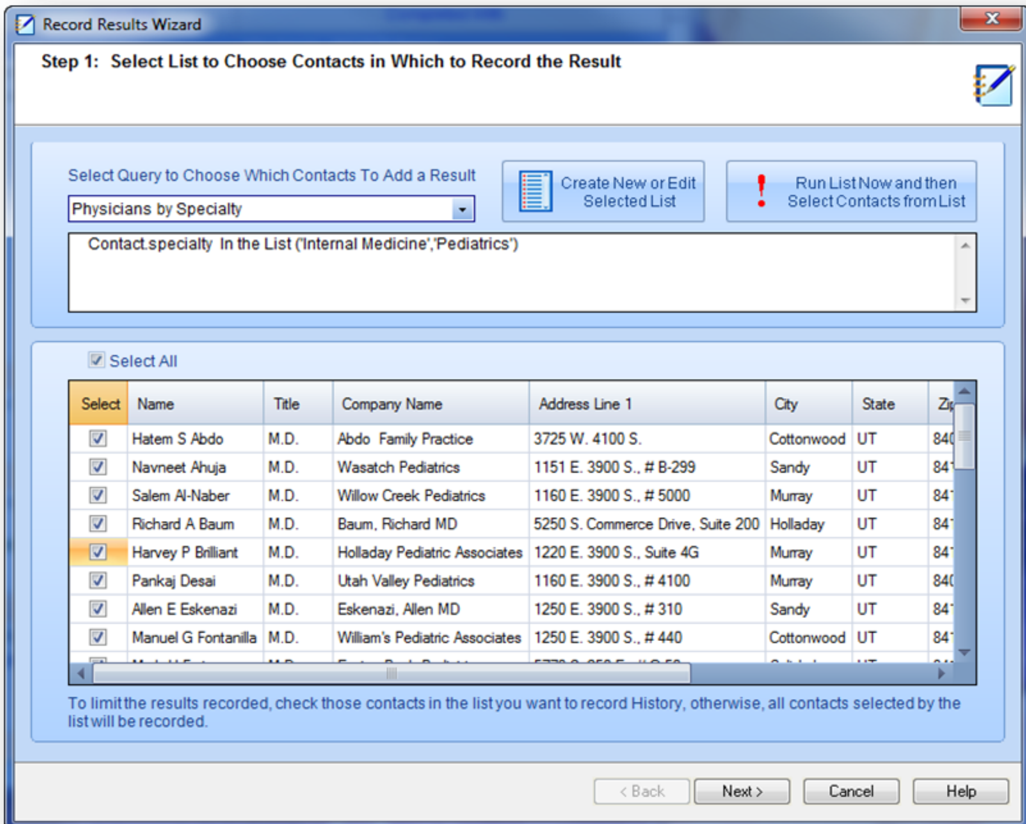
1. Display the History Window
2. Click the Radio Button for the desired view: (See below)



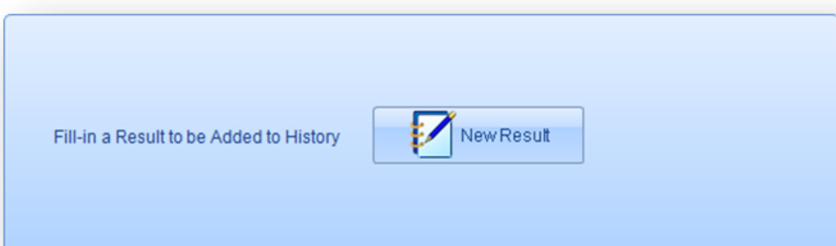
Using the History Wizard

The History Wizard allows you to record one History Record for a list of physicians/contacts. You can access the History Wizard by either clicking the History Wizard icon in the History View (Right), or by clicking on the Icon in the Results Window (below).

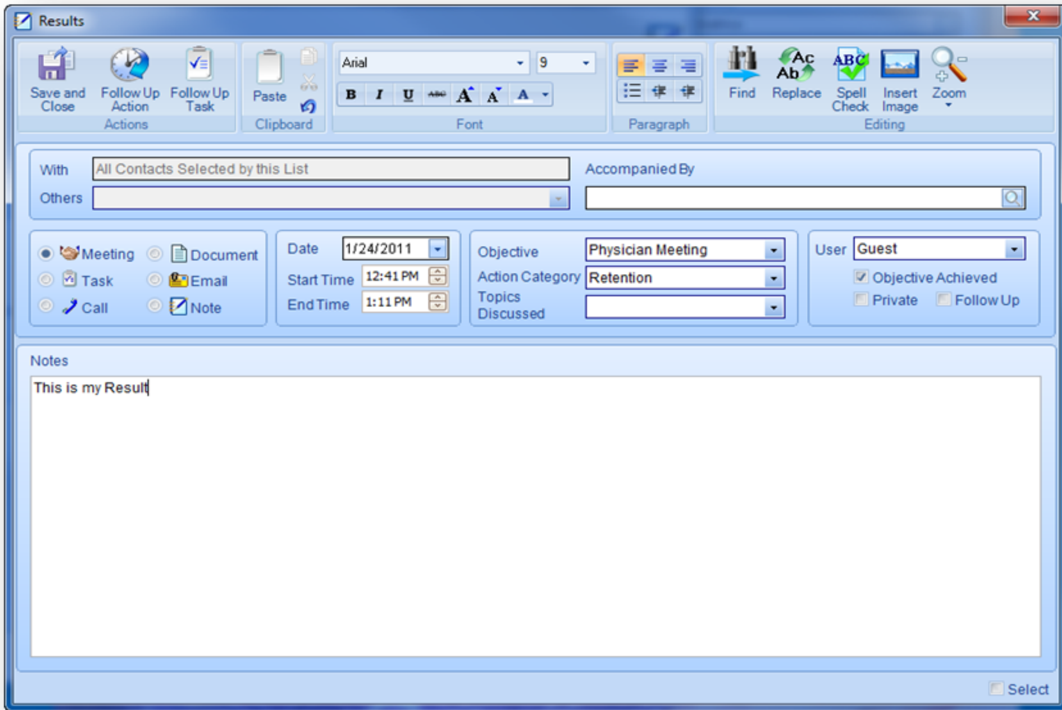
The First Step in History Wizard is to identify the physicians/contacts that you will add the result to. You do this by first running a List and then selecting the individuals from that List that should receive this Result.



The next screen prompts you to enter in the Result. Select the “New Result” button to enter the details of the Result.



Once you have entered the Result, Select Save and Close, and proceed to the Next Screen.



Select the Add History Button to add the History record to all contacts you selected in Step 1.

Resolving Issues and Problems

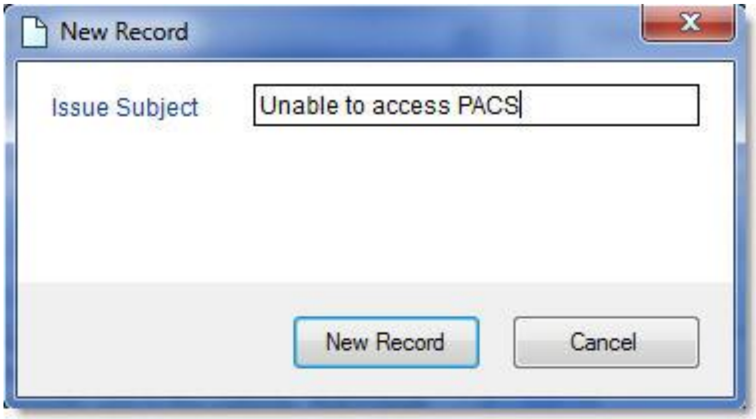
As mentioned previously, the purpose of the Issues and Problems page is to allow you to setup a "Stewardship" where you can ask another person in your organization to resolve a problem that you could not otherwise deal with because of lines of authority, your ability, etc., or, to record a problem you can resolve, and you want it recorded so that others are aware of it, and also so they can benefit by knowing how to resolve a similar problem, i.e., build a "Knowledge Base".

To Setup a Stewardship to Resolve an Issue, do the following:

1. Lookup a Physician.
2. Display the Issues page by clicking the Issue page header.

3. Add a New Issue by clicking the  button and selecting "Issues".

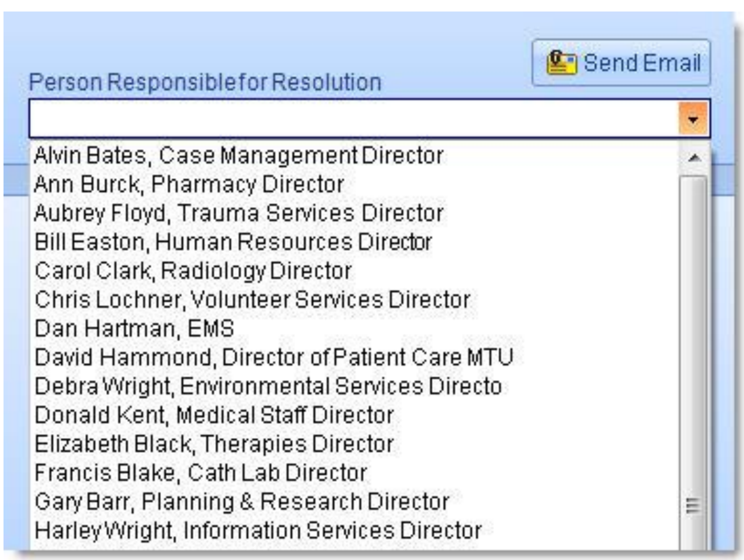
4. Type a "One Line" description of the problem you need resolved. (See Below)



5. Click "New Record" to add the new issue.
6. Select the Category "Imaging".
7. Fill in a detailed description of the problem in the Description box.
8. Note that the Date, Priority, Status, and Originator default. You may change them as needed.

To assign Responsibility do the Following:

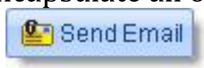
1. Select the Responsible Person. This is a person in your organization who has the capability or authority to resolve the problem. Select this person from the "Person Responsible for Resolution" drop-down box. (See Below)



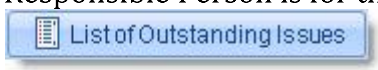
Note: The responsible persons should be setup by your system administrator. To set them up you'll need the person's name, title, and email address.

2. Assign a Due Date. This date then becomes the target for when the issue will be resolved.

To Notify the Responsible Person:

1. The most efficient way to notify the Responsible Person is to send them an email message. The system will encapsulate all of the details of the issue into an email message when you click the 

button on the Issues and Problems page. When the email form displays, you can also include any cc's to notify others besides the Responsible Person.

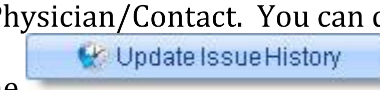
2. Another way to notify the Responsible Person is for that person to log into MarketWare and click the 

button. This will display a Quick List of all issues that are outstanding (it can optionally be configured to only display issues assigned to the currently logged in user.) The Outstanding Issues Quick List window will be automatically displayed once you click OK after the Quick List Runs. (See Below)

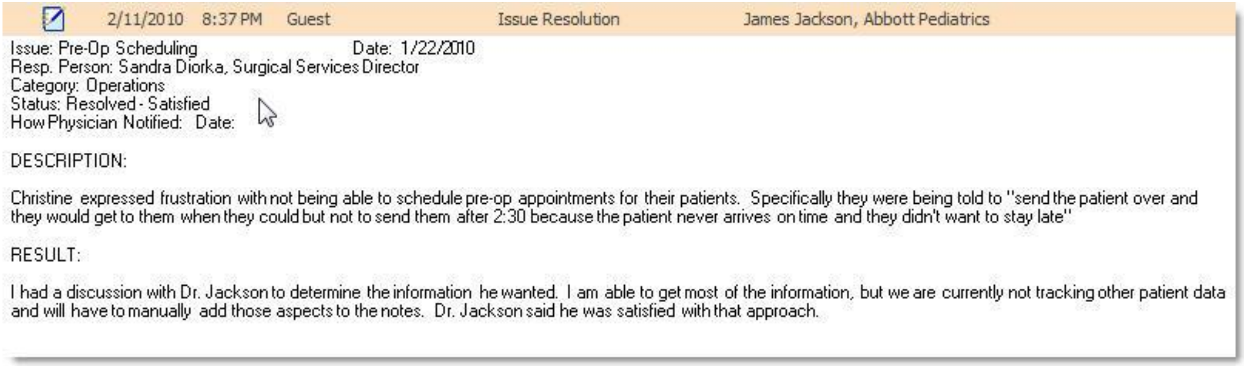
		Issue Subject	Name	Date Identified	Responsible Person
▶	View	Staffing	Brian Johnson	02/22/2010	
	View	Request for Block Time	Brian Johnson	02/16/2010	Carol Clark, Radiology Director
	View	OR Scheduling Problems	Lawrence Chin	02/13/2010	Larry Shelton, Director of Nursing
	View	Pre-Op Scheduling	Donna DeCosta	02/12/2010	Jennifer Murray, CNO
	View	Problem Accessing Records	Anwar Mumtaz	02/10/2010	David Hammond, Director of Patient Care MTU
	View	Not Getting Reports	James Jackson	02/07/2010	Kathryn Hansen, Associate Administrator
	View	Reports are inaccurate	Sushma Bhasin	02/06/2010	Harley Wright, Information Services Director
	View	A Problem in Imaging	James Jackson	02/04/2010	James Boone, Facilities Management Direc
	View	Pre-Op Scheduling	James Jackson	02/01/2010	Sandra Diorka, Surgical Services Directo

A Quick List is interactive, which means that you can highlight a row, and then click the View button to view the physician and the issue.

Copying Issues to History

You may decide that you want the information contained in your Issue to be available to anyone accessing the History of the Physician/Contact. You can quickly copy the issue to History and notes by clicking on the 

button at anytime. A record will be added to the History of the Physician.


2/11/2010 8:37 PM Guest Issue Resolution James Jackson, Abbott Pediatrics

Issue: Pre-Op Scheduling Date: 1/22/2010
Resp. Person: Sandra Diorka, Surgical Services Director
Category: Operations
Status: Resolved - Satisfied
How Physician Notified: Date:

DESCRIPTION:

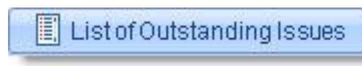
Christine expressed frustration with not being able to schedule pre-op appointments for their patients. Specifically they were being told to "send the patient over and they would get to them when they could but not to send them after 2:30 because the patient never arrives on time and they didn't want to stay late"

RESULT:

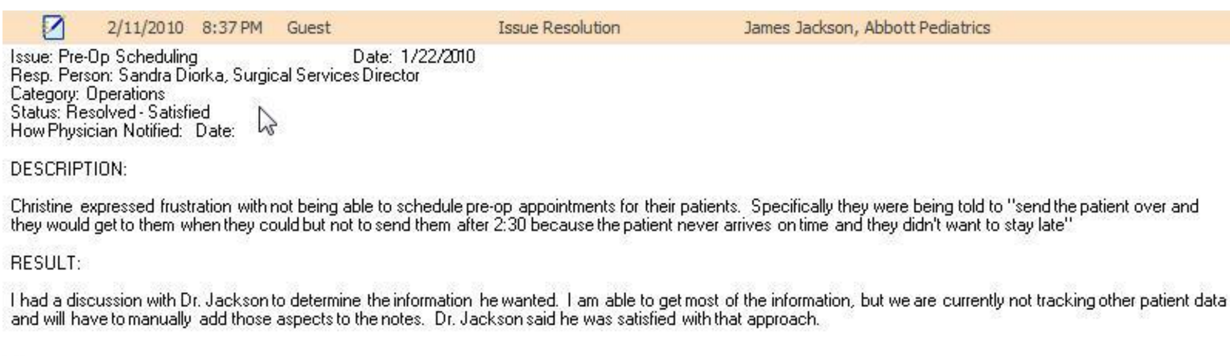
I had a discussion with Dr. Jackson to determine the information he wanted. I am able to get most of the information, but we are currently not tracking other patient data and will have to manually add those aspects to the notes. Dr. Jackson said he was satisfied with that approach.

Resolving an Issue

Once you've worked through the issue, and are ready to resolve the issue, do the following:

1. Look up the Issue by either Clicking on the 

button, or by searching for the Physician/Contact. Then go to the Issues page. If the issue being displayed isn't the one you want, use the  List, or Next/Prior Buttons to locate the issue.
2. Fill in the Result, and select a Resolution date.
3. Change the Status to Resolved – Satisfied, or Resolved – Unsatisfied. (Note: you don't want any of the later ☺)
4. When you change the status to "Resolved", the Issue is automatically recorded in History. (See Below)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RESULT:

I had a discussion with Dr. Jackson to determine the information he wanted. I am able to get most of the information, but we are currently not tracking other patient data and will have to manually add those aspects to the notes. Dr. Jackson said he was satisfied with that approach.

Printing Reports

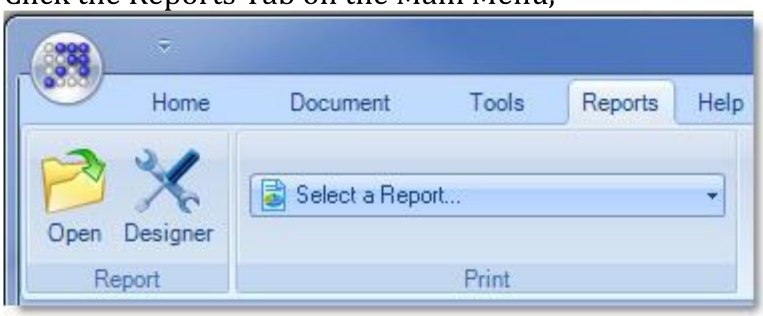
Now that you understand the basics of running queries, let's print out the results. A report is nothing more than a query that takes the results and places it on a piece of paper and formats it with Fonts, etc.

In this section of our training we are going to look at printing some basic reports. (Learning how to create reports using the report designer is beyond the scope of this training.)

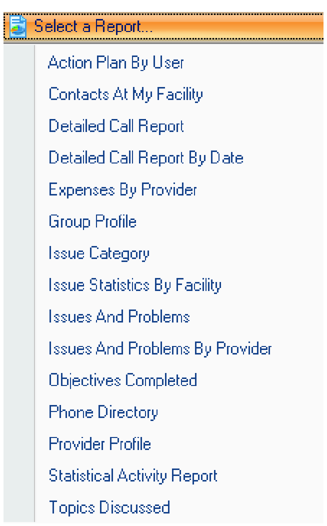
The Provider Profile Report

The Provider Profile Report is a great tool to use when you have a physician meeting. Print the report before going out to the physician, write your notes on it, and use it to update the physician's record when you return to the office. To Print the Provider Profile Report, do the following:

1. Look up a Physician. (Find Dr. James Jackson)
2. Click the Reports Tab on the Main Menu,



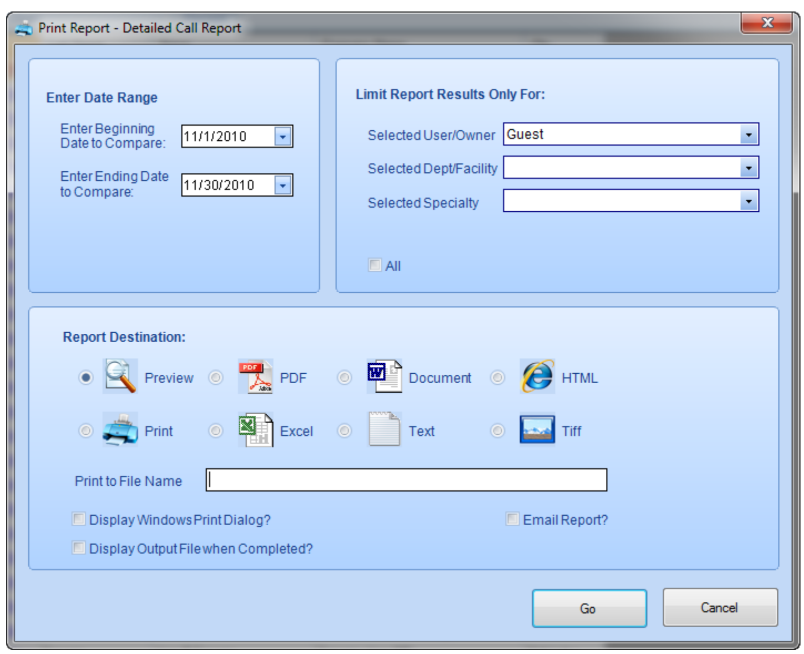
3. Highlight and select the Provider Profile from the drop down menu.



4. The report displays in a preview window. (See Below)

In Print Preview you can use the green arrow buttons to move from page to page in a multi page report. You can zoom, view more than one page at a time, and of course print the report from Preview as well.

Detailed Call Report

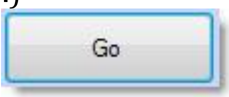


The Detailed Call Report is intended to display all the Calls, Meetings, Tasks, Emails, Notes, etc. you've recorded in History during a period of time. The report query is intended to be modified each time you print the report so that you can select whatever Date Range you desire. To print the Detailed Call Report do the following:

1. Click Reports on the Main Menu, and highlight and select the Detailed Call Report from the drop down menu.

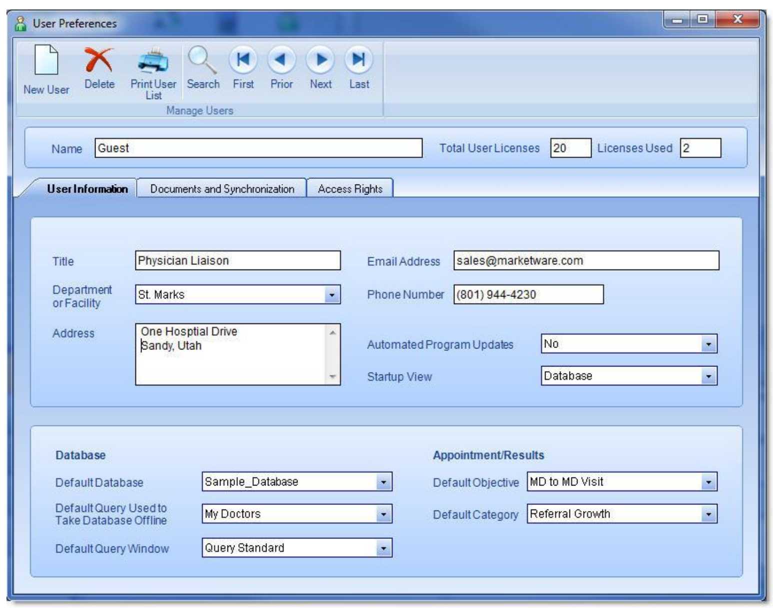
2. A window will open prompting you for the date range you want to report on as well as give you the ability to filter by MarketWare user, Dept/Facility, or Physician Specialty.

3. You can change the report destination to the Printer, Preview (default), PDF, Word Document, etc. (NOTE: Printing to a PDF is the easiest way to include a report in an email message.)

4. Then click the 

button to print the report.

User Preferences



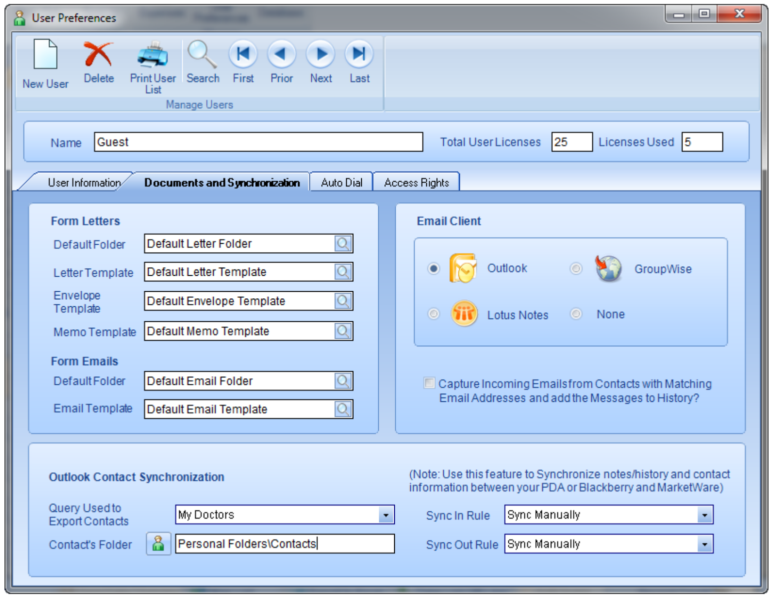
The User Preferences window allows you to setup a number of preferences that you will need to establish before you begin using the system. To Access the User Preferences window, click Tools, User Preferences from the Main Menu.

User Preferences has 4 pages; the first **User Information** should be filled out completely.

1. The Automatic Program Updates will insure you have the latest version of MarketWare installed at all times.
2. The Startup View allows you to identify which View you will see when you Open MarketWare (Database, Today, List, Calendar, Etc.)
3. Setting your Defaults for Objective, and Category will auto fill in those values when recording results (you will still have the ability to change these each time you record results, it simply saves you time by auto populating the Objective and Category you would typically do most.
4. When going off-line MarketWare will either take the currently running List, or your Default Query to go off-line.

The **Documents and Synchronization** Tab allows you to identify default Folders.

1. The Form Letters and Form Emails Defaults are typically where they should be, but if you prefer to store your documents on a file share that gets backed up regularly select the  button next to each Folder/Template and select the appropriate Folder/Template. Just be aware that if you choose a folder that is not on your local PC, it won't typically be available when you are out of the office.



2. If you use Outlook, GroupWise or Lotus Notes to Sync your contacts with to and from MarketWare; identify the query you would like to use, and rules for Syncing in from Outlook, etc. and Out from MarketWare. You can also create a separate folder in Outlook for your "MarketWare Contacts"

The ***Auto Dial Tab*** is used to call directly from your PC. You must connect your PC to a phone to make this work.

The **Access Rights** Tab is only used by the MarketWare administrators to setup Security/Etc. within MarketWare. However, you can use it to change your password if you've been assigned one. You don't need to assign a password if you are using integrated security (i.e., Windows Authentication) as your network password will serve to log you into MarketWare.

Are We There Yet?

The topics we have covered so far should give you some familiarity with what MarketWare is capable of, but there is so much more it can do. We recommend that once you feel comfortable with the program you do some more exploring.

Take advantage of the Resources you have available to you on the Help Menu as needed.

We are happy to assist you in any way; we can provide Additional Training on the more advanced aspects of MarketWare such as Query Building, Mail Merge, Report Designing, etc.

How to Contact Us:

If you would like additional training or information please contact us at:

MarketWare Systems, LLC
(801) 944-4230 Option 3
support@marketware.com

Web Site: www.marketware.com